City of Jacksonville Tree Commission
Urban Forestry Master Plan SubCommittee
March 16, 2023
9:30 AM

An immediate goal of the Tree Commission's Strategic Plan is to
"Obtain an Urban Forest Master Plan to guide future actions."

1. Presentation by Justin Gearhart, City Arborist

2. Stakeholder Perspectives

3. Typical Urban Forest Master Plan

    (examples)
    Urban Forest Management- A Primer to Strategic Planning for Municipal Governments
    City of Boston Urban Forest Master Plan
    ReLeaf Cedar Rapids

4. Funding Options

    Florida Urban and Community Forestry Grant – Joe Anderson, Forester, JEA
    City Budget

5. Agenda / discussion items for subsequent SubCommittee meetings

6. Establish SubCommittee Meeting Schedule

Jacksonville Tree Commission
Urban Forest Master Plan Committee Minutes
Thursday, March 16, 2023, 9:30AM
Approved April 19, 2023

Ed Ball Bldg., 10th Floor, Conference Room 5

Attendees:

Susan Fraser, Tree Commissioner
Justin Gearhart, City Arborist
Jameka Smith, Landscape Architect
Kathleen McGovern, Parks Dept.
Cindy Chism, Staff

Joe Anderson, JEA
Scott Sauder, JEA
Nancy Powell, Scenic Jacksonville
Fred Pope, Scenic Jacksonville
Lisa Grubba, Greenscape

1. **Call to Order –** Ms. Fraser

2. **Roll Call** – Cindy Chism

3. **Objective** – Susan Fraser

   a. We're not here to write the Urban Forestry Master Plan, we here to develop a scope of work and an approach to generate an RFP or RFQ to contract the work. We will determine what the Master Plan looks like and how to get one implemented in Jacksonville.

   b. We have the City Arborist who cannot do this by himself and there is the mandate from the Strategic Plan that this is one of our immediate goals.

   c. Part of this discussion will be what do we want and how do we fund it, hopefully there will be more than one way.

   d. There are so many voices looking for Master Plans and Studies, we must find a unique hook on why this is important and why it is important now. We need to build consensus and a wave of support; we must sell this.

   e. Mr. Anderson pointed out we need a sales pitch. There are five steps to a good sales pitch, 1) pique their interest, the hook, 2) build integrity, 3) understand the needs, 4) meet their needs and then 5) ask for the sale. If we can build those principles into the Urban Forest Master Plan, we'll have a good sales pitch to give to our public and representatives.

4. **Presentation on Urban Forest Master Plan Workshop** – Justin Gearhart

   a. Attachment A is an overview of the workshop attended. Attachment B is the general outline of all the steps required. Attachment C is a condensed outline of Attachment B and may be used as the Introduction and Table of Contents.

   b. Money and the ability to commit to the large amount of time necessary are the largest two obstacles: staff time or money for consultants.

   c. Mr. Anderson asked if those two obstacles are why we don't have an Urban Forestry Master Plan now? Mr. Gearheart said part of it is there really hasn't been an Urban Forest Division until recently, the Manager position is only five years old and has a lot of other things to catch up on. It is something which probably should have been done in 2000 when there was clearly overwhelming support of the population. It is something which is overdue, every City is focusing on it right now, large and small, more and more people are becoming aware of what is required for an Urban Forest. It is a great tool to manage the existing resources.

   d. We do have an inventory, but we will need a social survey done of the City. A social scientist, perhaps someone from UNF we could partner with, without that, getting Mayoral and City Council support is much harder.

   e. Ms. Fraser suggested before sending out a survey, an education program should be done. The state of the industry has changed in 20 years, now people understand it is a deliberate process, to plant and maintain and replace.

5. **Stakeholder Perspectives**

   a. Mr. Sauder said this was the first place he's ever worked in which the community does not care about trees, coming from Savannah and Atlanta. The vast majority of the customer calls we receive at JEA are people wanting trees removed. They are afraid of trees here, perhaps because of hurricanes. It seems to be a culture issue, a lot of the immigrants from the Caribbean and South America, they don't want any trees in their yard.

   b. Ms. Fraser added the insurance companies seem to be driving that as well. As people buy new homes, especially in the Riverside area, they have to get inspections to get reinsured and the insurance companies are telling them they will not insure their new home unless they remove X tree. Though we can't stop the insurance companies, we can get them to plant a tree if they remove one.

   c. Ms. McGovern asked if Ms. Fraser thought the best idea was a Master Plan for the whole City or to break it up into pieces. Ms. Fraser said she personally believes there should be subarea designations, the Core, the Suburban, the World and some of the data which helps us decide where those boundaries are where the development is occurring, where is there pressure for development because that's where the trees are

being removed and where are we anticipating pressure for development 5 years from now. The whole City is too much, we would do well to be successful where we find support and then use that as an example to say we can help you too, come see us. The worst thing to do is to visit people and say we are the government; we are here to help you. We need to find a successful location which thinks like we do, thinks this is an important part of their community and be successful there and then repeat it.

d. Mr. Gearhart pointed out that one thing to keep in mind is Florida and various entities within Florida, conservation measures usually pass with a majority of 60% or so. This could be applied to Jacksonville as well. There is support here but we just don't have it in a quantifiable form. Without that we can't say to a Council Member, we have the citizen's support, we are trying to get this done and can you help us.

e. Ms. Fraser agreed, the survey will measure what people will support, what the data tells you and what the community wants to ask for. However, we can't put a survey out until we decide on the massive public education PR program. That is all the data on what trees do to clean the air, stop stormwater, and help with flooding and home values. If we can't tell people there is a measurable benefit to them, it's too ethereal, and we won't get support.

f. Ms. Grubba said if you want to feel good about trees and the public, come out to a Greenscape tree planting. We see the opposite of what you see, we see people who are enthusiastic about trees. People come not necessarily because they are tree-huggers, they come because they need service hours or their company is making them, but then they are out in a beautiful park on a Saturday morning and in under 2 hours that place has been transformed with volunteer effort. There is also advocacy and education about trees, e.g., this tree planting is solving an issue of stormwater uptake. The result is so much enthusiasm and camaraderie, it is quite gratifying. We do hear, especially in low-income neighborhoods, that people are afraid. They do not have the time or the money to deal with a tree. That is an education process other cities have gone through and maybe we can learn something from them. The City of Atlanta has done a huge education program in its community and maybe we can take some lessons from them.

g. Ms. Grubba continued, in attending the national and state conferences we see the successful programs all have strong leadership at the top, a strong advocate in the head of Public Works or their Mayor. Whether that came from a grassroots consensus or came from that person is unknown, but they also incorporate all different groups, not just the municipality. It's more work than one city can do, they need the workforce development people and their advocacy groups and their university extensions and getting everyone working together. A lot of cities have that figured out, though there is

not one template because every city is different but that tis the key, strong public/private partnership.

h. Ms. Smith said she has done management plans and master planning and in doing them in the past, public consultation and buy-in is the most critical part. The funding comes but it's the public consultation and buy-in which really gets the funding. In listening to everyone and hearing there might not be much public which wants these trees, if not them then who is it going to come from. If the Stakeholders push it and then it collapses because the public doesn't really want it. It can't come from the Stakeholders; it must be the public who truly want it.

i. Ms. Grubba asked what the process was to update the tree inventory. Mr. Pope said he didn't think getting another inventory was necessary since the most current one was done in 2017. American Forest did a study in Jacksonville approximately 10 years and it includes percentage of canopy. The historic studies could be compared to the 2017 study to see a trend which could be utilized right now. This study is posted on the American Forest website.

j. Ms. Fraser added we also have the permit report from the Planning & Development which gives us the address of the permit, the number of tree inches removed of the 4 categories of removal, all those inches planted and the inches deficit. Ms. Fraser wants to request the Planning Department geocode the addresses to facilitate mapping. Mr. Gearhart said he didn't need that much detail; council district or zip code should be sufficient.

k. Ms. Powell suggested what we need is the overall trend of how much canopy we are losing per year, 5%, 10% or more? Mr. Pope said with the 3 reports we currently have we can calculate the trend, each report had a canopy assessment; 2005 American Forest report, the 2017 inventory and the I-Tree Report.

6. **Typical Urban Forest Master Plans**

a. Attachment E is an overview of the Urban Forest Master Plan for Tallahassee done in 2018. Mr. Pope said it is so much like Jacksonville and includes a section on recommendations which seems to parallel what Jacksonville is going through. There is also a section on community outreach, regulatory issues, it is a very comprehensive plan.

7. **Funding Options**

a. Mr. Pope suggested educating the City Council members on the canopy loss which is taking place now, how important a Master Plan is and request funding to at least get a

social survey to determine what the residents want. We have enough data to develop a simple presentation illustrating the loss trend.

b. Ms. Fraser asked the committee members who are engaged with Council members, if they thought the Council members, incoming and outgoing, if we can get enough consensus at the political level will the social survey and the actual fine points of what people in actual communities want to do, can be part of the study, do we have any champions on the City Council, going by district and the ongoing development.

c. Ms. Fraser said grants are one option (Attachment D). Mr. Anderson said there were a lot of submissions this year, so many that the funds had to be spread out. This year there were 30 applications, there were 28 last year, and 80% got grants but not the full amount. Mr. Gearhart added, this isn't something we can get grants and matching funds for, we will have to get additional funding from another source. A grant will help, but it is a drop in the bucket. Ms. Grubba asked if there were grants, we don't know about and if the City's grant writers could help.

8. **Discussion Items for Subsequent Committee meetings**

a. **Ms. Powell will send out the updated list of links for other plans**. **Ms. Fraser suggested everyone select one plan to read through and give a brief overview at the next meeting**.

b. Mr. Pope agreed a Scope of Work included a review of all the existing documents. In the Tallahassee Plan there was a very thorough review of the regulatory situation. Ms. Powell added we don't want to duplicate the effort we've already completed but we also need to follow through on some of the recommendations which have already been made.

c. Mr. Gearhart pointed out that's why we need support from the top. Also, if we don't have the citizens' support, values included, there will be no sign-off from City Council or Mayor. If the City Council and Mayor were not approached first, and their input added, their support would not be forthcoming. There are two things which need to be determined first; how the City Council and the Mayor feel about a Master Urban Plan and then how do the people feel.

d. Ms. Powell recommended not doing a survey without some education first. Mr. Gearhart said the surveys are relatively simply. There is a sample survey from the seminar I just attended; the questions are basic and don't require any detailed knowledge of tree canopy. If you wait to educate the public before the survey you may find that people don't listen, they don't read, or you won't change their minds but now you've wasted time and money.

e. Mr. Gearhart continued; the first is a social scientist must design the questions of the survey in ways that people will understand. The survey must be done by a social scientist so we have results we can stand by. Ms. Fraser added, but we must sell the funding for the social scientist's survey. Mr. Gearhart replied, with our limited staff and City Council's time can we find a way to build support. Ms. Powell pointed out that the Resiliency Report may contain a lot of data which would be relevant to us.

f. Ms. Fraser asked, with what the Tree Commission does, they have money, there are meetings, projects, programs how will an Urban Forest Master Plan benefit that process. How will this enhance and complement the delivery of trees in the City. Ms. Powell said it's more than the delivery of trees, we must protect the existing tree canopy, maintenance, prevention, and how do we deal with private property. The Tree Commission doesn't address private property at all.

g. Ms. Powell suggested calling the plan Urban and Community Forestry Plan. Ms. Powell will go through each of the reports and list the table of contents for each one for comparison purposes. **It is recommended that everyone read the Tallahassee and Miami Master Plans.**

h. At the next meeting if everyone could develop an opinion about pieces which are integral to our success, pieces we would like to have and pieces which appear extraneous to what Jacksonville is or is trying to accomplish. Ms. Powell added, the geographic scope is an important discussion. Ms. Fraser said the scope of the work would say the study includes the creation of sub-areas for application of policy.

9. **Establish Meeting schedule.**

a. Meetings will be held on the third Thursday of the month at 9:30am in the Ed Ball Bldg., 10th floor, conference room 5.

10. **Adjourned.**

Urban Forest
Master Planning
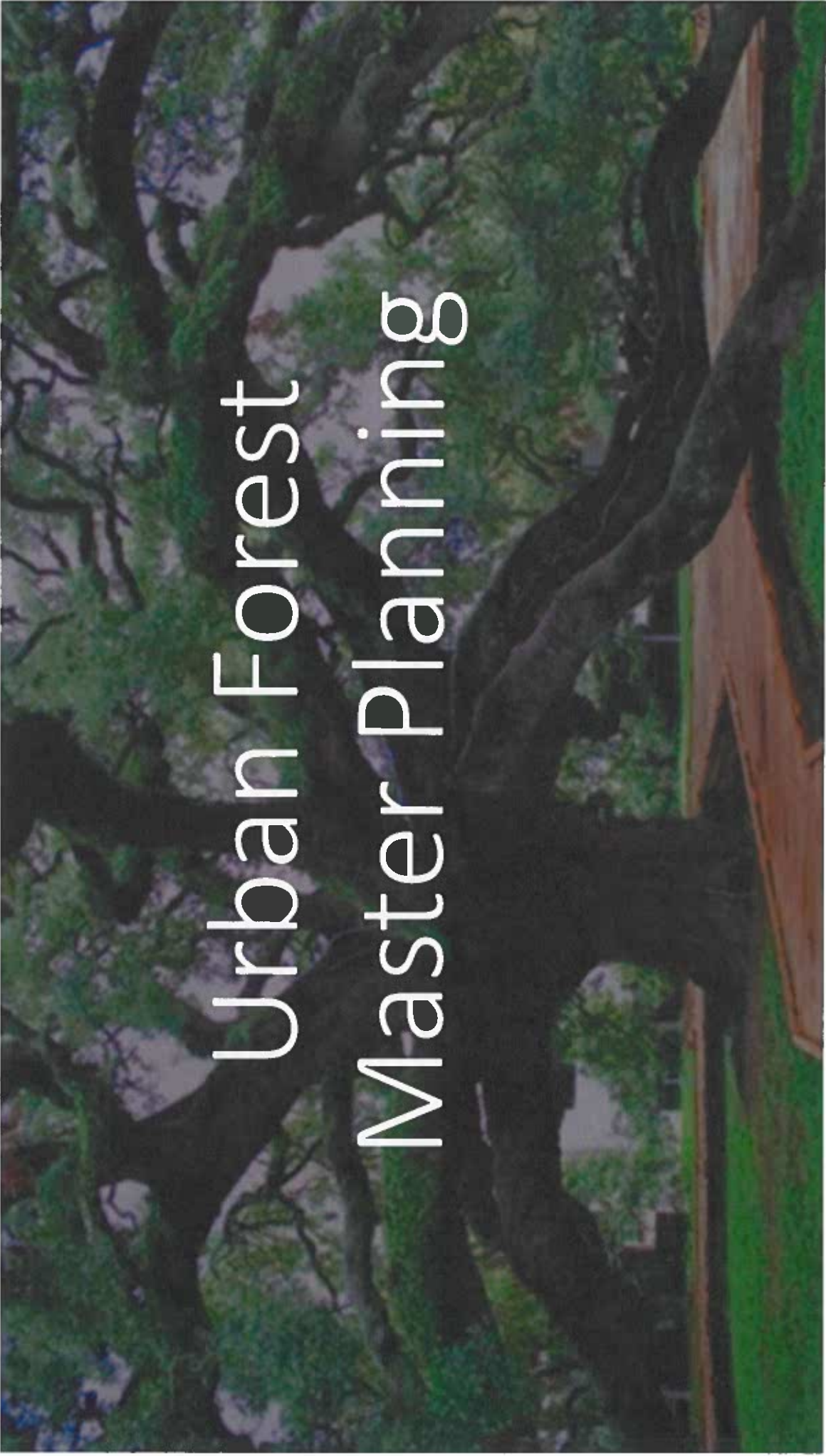
Urban Forest Management: A Primer to Strategic Planning for Municipal Governments Authored by Northrop, Andreu, Zipperer

A guide to assist in the development of a strategic plan for urban forest management.

Helps create manageable expectations

Focus on short-term decisions and long-term planning

Urban Forest Management Plan

20-year plan

- With 5 year-operational plans

Highly involved, resource intensive 2-year process to develop

Questions to ask ourselves:

- What do we have?
- What do we want?
- How are we going to get there?
- How do we determine if we have arrived?

What do we have?

- An inventory and several studies conducted on our canopy.

- A population that voted overwhelmingly for tree mitigation in 2000.

- Do we know how the general populace of Jacksonville feels today?

- Do we know the facets of the Urban Canopy that feel we should?

What do we want?

- As a large and diverse city, what are some common themes of the desires and needs of the people regarding our Urban Forest?

- Reactive vs proactive management: both are necessary and need to be flexible

How are we going to get there?

GOALS

OBJECTIVES

PLANS

How do we determine if we have arrived?

- Proper monitoring of plans and work conducted

- Criteria set prior to implementation of plan

- This is not a pass/fail statement. There can be varying degrees of success or failure. Progress is something to not discount.

An Urban Forest Management Plan Must Address:

Social Economic system:
- Population, wealth, history, etc....

Governance System:
- Budget, regulations, policies, etc....

Ecological System:
- Species composition, soils, hydrology, etc....

Things to think about

- Strategic planning is a social endeavor
  - Success or failure is usually determined by the people's values and whether they were included or not.
- The urban forest is not static, it is in a constantly fluid state
- This is an extremely involved and time-consuming process
  - There will be delays, many meetings over several years
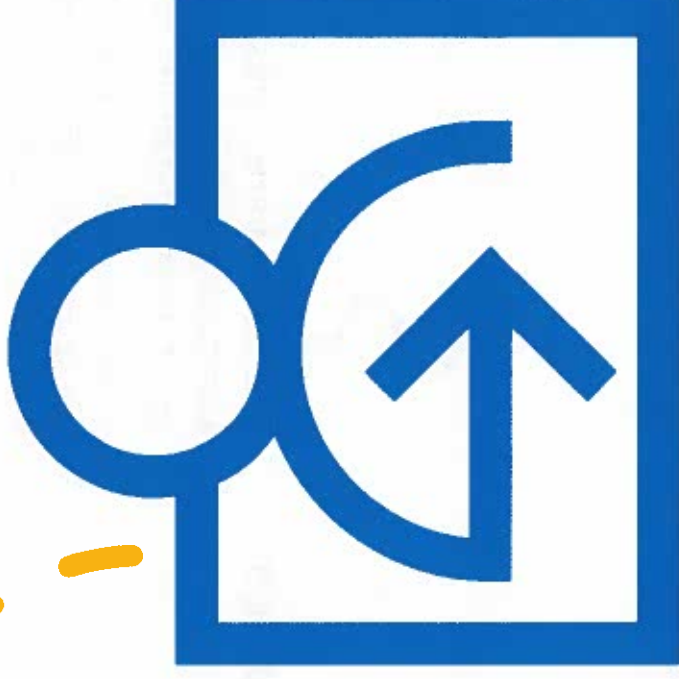
Costs

Boston spent approximately $500,000 on their plan

Miami Beach spent $104,000 on their plan.

The lesson here is this isn't something we can just have a grant/matching funds for.

Money and ability to commit to the large amount of time are two huge factors in ability to conduct strategic planning

1. Plan Initiation and Engagement

Year 1											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
x											

Step 1: Appoint Project Team

What:

Appoint a Project Team (2-3 people) to actively guide, facilitate and oversee the strategic urban forest management planning process. They need to be able to work together to meet a common goal of crafting a strategic plan for urban forest management programs.

Why:

Professional skills will be essential to successfully guide the strategic urban forest management planning process.

Who:

City Administration

How:

Appoint members of the Project Team that will bring needed expertise in project planning, meeting planning and facilitation, and consensus building, as well as forest science and ecology.

Attributes of a successful project team include:

- Knowledgeable and experienced in facilitation, consensus building and conflict resolution

- Experienced in multi-year strategic planning

- Knowledgeable about social survey design and analysis

- Knowledgeable and experienced in forest ecology, arboriculture and urban forest management.

- Knowledgeable and experienced in government processes including budgetary cycles; comprehensive planning; policy development; and development of ordinances and laws pertaining to urban forest management and land use change.

Our experience suggests...

1. Outside consultants may be disinterested and guide development of a strategic plan that is not tailored to specific social, ecological and governance conditions.

2. Ideally, the mandate for the initiation of this strategic planning process comes from the government's chief executive, to ensure that all departments and agencies fully cooperate in its development.

Project planning team. UF/IFAS photo by Tyler Jones

Step 2(a): Community Engagement

						Year 1					
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
x	x	x									

Investigation of attitudes, perceptions and values concerning the urban forest held by the public and government agencies. Note: Steps 2(a) and (b) can be conducted simultaneously.

What:

Conduct a valid science-based investigation of the attitudes, perceptions and values of residents and public agencies concerning their interest in the conservation of the urban forest and its management. The responses to the investigation should reflect the diversity of public as expressed by the U.S. Census.

Why:

Urban forest management is a social endeavor. Whether on private property or on publicly owned land it is ultimately people's values which will determine which urban forest resources are conserved and how that will be accomplished.

Unlike the one-way flow of information in public relations, public participation is a two-way process between managers and the public. There are many 'publics' which often requires the use a more than one engagement tool.

Participatory processes and engagement tools:
- Random sample surveys
- Small workshops
- Neighborhood listening sessions
- Advisory committees
- Focus groups
- Nominal groups

Although urban forest management is often seen as a technical or a scientific discipline, it is primarily an expression of the values of those involved in mandating, shaping, opposing, or practicing it.

Who:

City Administration in cooperation with the Project Team

How:

Online and in-person surveys, nominal groups sessions and focus groups (as needed) can provide structured information. Community meetings and listening sessions provide opportunities to interact with the community and learn from people's life experiences.

Work with people experienced in participatory planning (including the Extension Service and community organizers) to learn the best ways to engage the diversity of your city's residents. See Appendix A for an example of an online survey instrument.

Our experience suggests...

- It is not uncommon to find disenfranchised publics, competing and overlapping agencies and institutions, and a lack of awareness of environmental problems and solutions. If these issues are not recognized and addressed, problems will continue throughout the strategic planning process. A strong constituency of both the public and institutions is needed during the strategic planning process and to affirm and validate its continuation.

- The social survey should seek to answer questions concerning an understanding of the urban forest and residents' vision for the future urban forest.

- Contract out the design and implementation of the investigation to an experienced natural resources social scientist.

Help may be found at your state's land grant university or other colleges and universities.
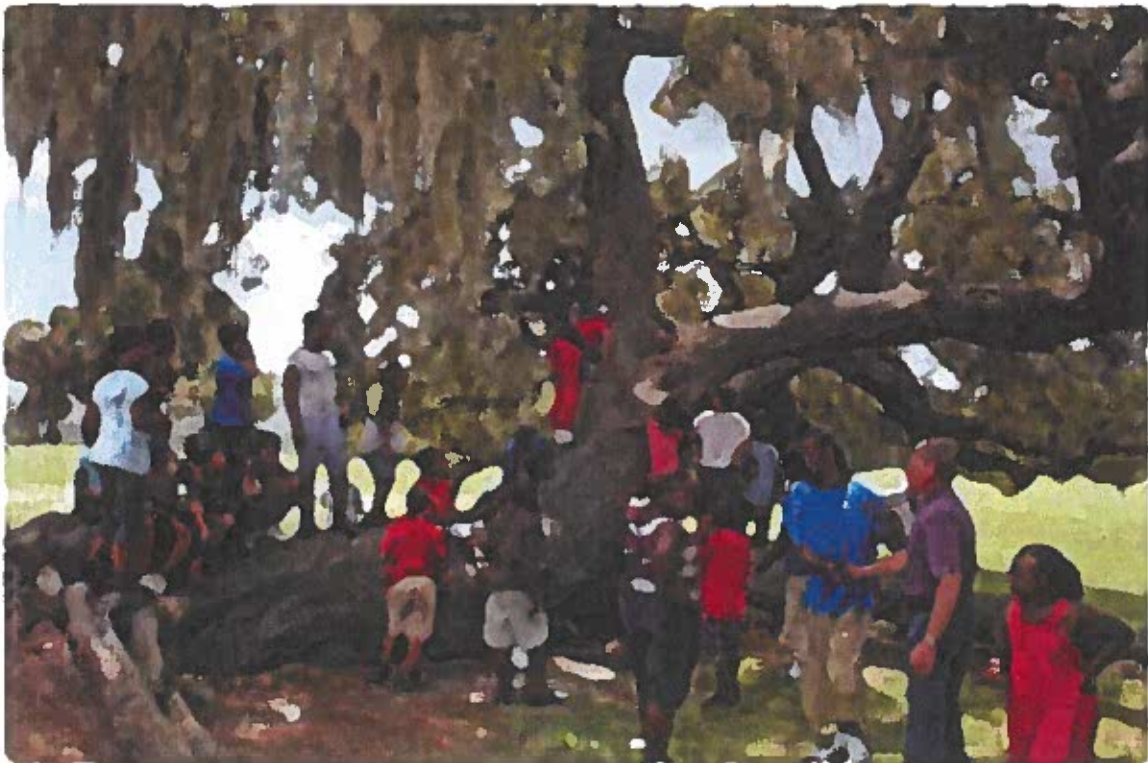
City park in Tampa, FL.

Year 1											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
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Step 2(b): Design and Conduct the Ecological System (bio-physical) Inventory and Analysis

What:

Conduct a science-based ecological systems (bio-physical) inventory and analysis of the urban forest.

Why:

Results from this effort are used to advance the understanding of the urban forest resource; improve urban forest policies, planning, and management; provide data for potential inclusion of trees within environmental regulations; and determine how trees affect the environment and consequently enhance human health and environmental quality in urban areas.

Who:

City Administration in cooperation with the Project Team

How:

1. Inventory and analysis should be undertaken by individuals knowledgeable in designing urban forest inventories in cooperation with the Project Team.
2. The inventory and analysis should focus on data and information that is directly needed to support the strategic planning process. Conserve time and financial resources by gathering the highest priority and/or most easily obtained data first.
3. The inventory design should take into consideration capturing data at the various geographic scales (neighborhood, planning district, etc.) typically used by the city in planning and operations. This will be critically important in allowing the integration of city forest information into broader planning activities.

4. The physical field work can be contracted out and overseen by the Project Team.

Time to accomplish this step will depend upon size of area, diversity of land use types and level of detail required and funding available.

Year 1											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
			x					x			

Step 3: Reports on Analysis of the Social Survey and Bio-physical Inventory/Ecological Analysis

What:

Prepare reports on the results of the social survey and bio-physical inventory and ecological analysis. Place them on the city's dedicated urban forest management program website. Distribute them to all news and social media outlets, and workshop it with the City Administration and City Commission/Council.

Why:

The reports form the foundational information that sets the course for the strategic planning process.

Who:

Project Team in cooperation with the natural resources' social scientist.

How:

The reports should be edited by a professional editor and graphic layout should be designed by a professional familiar with formatting for print, digital media, and social media.

See Appendix A.

Note: Enhance the reception of these reports by non-technical audiences through the development of concise and non-technical fact sheets and graphic illustrations.

City of Tampa
Tree Canopy and
Urban Forest
Analysis
2016

Example of a bio-physical and ecological analysis report

Year 1											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
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Step 4: Develop Guiding Principles

What:

Identify a set of Guiding Principles that define the legal limits and constraints of City management.

Why:

The Guiding Principles define and frame the broad constraints for municipal government management of the urban forest.

How:

Project team shall offer examples of common Guiding Principles for Municipal governance to initiate the discussion, and guide a consensus building session.

Who:

City Administration in cooperation with the Project Team

How:

Facilitated meeting of City Administration and Project Team

Examples of Guiding Principles:
- Government efficiency
- Economic growth
- Support social equity
- Maintain environmental integrity
- Increase the social, environmental and economic benefits of the urban forest while reducing costs
- Support unique character of neighborhoods
- Support basic tenets of the city's comprehensive plan

Our experience suggests...
- The Guiding Principles allow everyone working in the strategic planning process to understand the scope of what the municipal government can and cannot do regarding urban forest management.

The Guiding Principles should be revisited repeatedly throughout this entire process to as a helpful way to keep the process moving forward in a positive manner.

Year 1											
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Step 5: Announcement

What:

Announce intent to develop a strategic plan for urban forest management.

Why:

Publicly initiate the strategic urban forest management planning process with clear intent to operate transparently and engage the community throughout the strategic planning process.

Who:

City Administration

How:

1. Provide news and social media outlets a narrative concerning the city's intent to develop a strategic plan for the urban forest management program and the proposed process.

Establish a dedicated City Strategic Urban Forest Management Planning website to provide a mechanism for open access to all associated strategic planning documents and allow public comments.
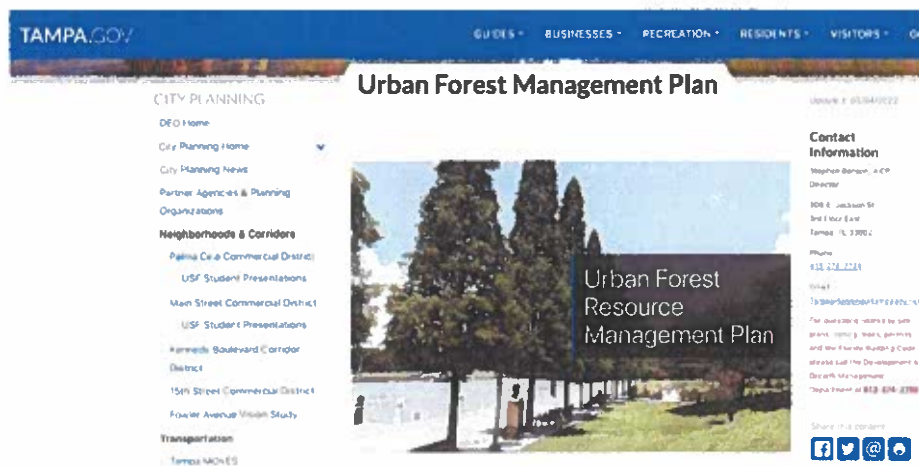
Example of urban forest management plan website.

Year 1											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
				x							

Step 6: Appoint a Public Committee

What:

Appoint a Public Committee representing the numerous and various societal interests in managing the urban forest.

1. The Public Committee should be limited to 10 – 15 people to allow for constructive facilitated interaction and development of trust.
2. The Public Committee should embody the diversity of values identified by the social survey.

Public Committee Membership:

Categories:
- Citizens
- Stakeholder groups
- Businesses
- NGO's
- Professional organizations
- Researchers

Characteristics:
- Volunteers
- Diversity
- Multiple partners
- Inclusive
- Skills and knowledge match the task

Why:

The Public Committee will represent the values of the public as identified in the social survey and articulate those values as a Vision and Goals for management. They will also serve as advocates for the public's values throughout the entire strategic planning process.

Who:

City Commission/Council with the Project Team
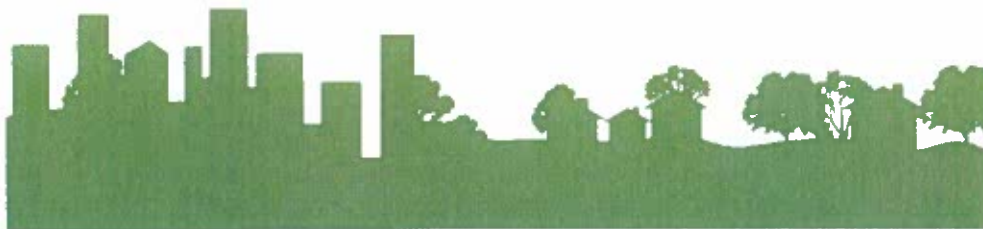
Year 1											
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Step 7: Workshop with Public Committee

What:

Workshop the results of the social systems survey, ecological system (bio-physical) inventory/analysis and Guiding Principles with the Public Committee.

Why:

The social systems survey and ecological system (bio-physical) inventory/analysis are the primary source information for the Public Committee's work.

Who:

Project Team

How:

Distribute complete written and digital reports to all members. Conduct a series of presentations and discussions guided by the Project Team.

Public committee workshop.

2. Plan Development

Year 1											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
								x			

Step 8(a): Development of the Vision

What:

Develop a **consensus** Vision Statement for urban forest sustainability.

> **Definition of Consensus:**
>
> A group decision-making process in which participants develop and decide on proposals with the aim, or requirement, of acceptance by all. The focus on avoiding negative opinion differentiates consensus from unanimity, which requires all participants to positively support a decision.

Example:

> **Vision Statement:**
>
> The urban forest is abundant, diverse, healthy, and benefits the community

Why:

1. The vision statement defines, in qualitative terms, the purpose of the city urban forestry program; what the City is striving to achieve.
2. Vision statements ensure that developers of a plan have a common understanding about the intended outcome of management.

Who:

Public Committee

How:

The Project Team will guide a series of consensus building sessions for the Public Committees.
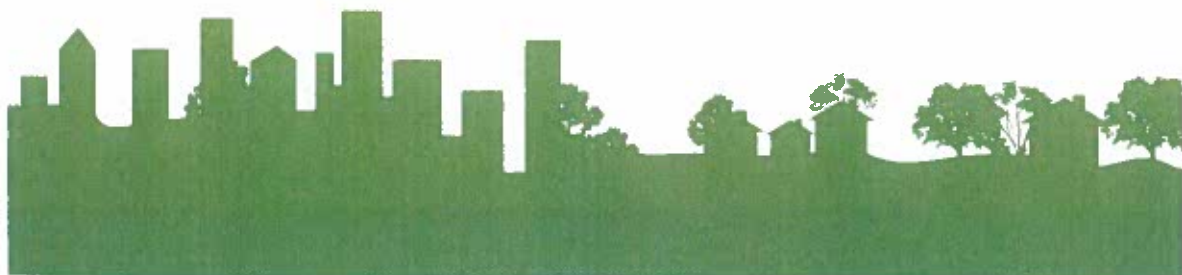
Our experience suggests...

- The Project Team remains completely neutral, resisting any calls or suggestions to provide options on the Vision.
- The Vision should be strictly based upon the values of the people, not technical experts.

This step may take 3 to 4 sessions. Take the time needed; it is fundamental to the planning process and committee members may be new to such a process.

Public committee developing a vision statement.

Year 1											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
									x		

Step 8(b): Development of the Goals

What:

Develop a broad set of Goals for urban forest sustainability. The Goals will frame the Plan's management actions toward achieving the Vision.

Example:

Vision Statement:
The urban forest is abundant, diverse, healthy, and benefits the community

Goals:
1. The urban forest should predominantly reflect the diversity of the surrounding native forest.
2. The urban forest should be healthy, resistant to insect infestation and diseases, and resilient to damage and disturbance.
3. The urban forest should include woodlands, parks, old trees that reflect the historic character of the region, tree-lined roadways, individual trees, and understory vegetation.
4. The urban forest should support a mutually enhancing relationship between the natural and the built environments.
5. Citizens and their government should be educated about the urban forest and its benefits.
6. The urban forest should bring beauty, interest, and a calming atmosphere to the urban environment.
7. The urban forest should support the city's communities' values and unique character.

Why:

Goals are envisioned as a large-scale reflection of public values concerning the bio-physical condition of the City's urban forest. They will be used to judge urban forest sustainability.

Who:

Public Committee

How:

The Project Team will guide a series of consensus building sessions for the Public Committee.

Year 1											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
									x		

Step 9: Report Vision/Goals

What:

Prepare report on the Public Committee's consensus Vision and Goals.

Why:

1. Foster collaboration and public participation in the decision-making process.
2. Ensure that all government officials continue to have full and open access to the process and that the pubic continues to see that the strategic planning process is operating transparently.

Who:

Project Team with Public Committee

How:

Place the report on the city's dedicated urban forest management website, release it to all news and social media outlets, and workshop it with the City Administration and City Commission/Council.

> **Note:** Your municipal government may not need a formal workshop at this time. A concise briefing paper my suffice.

Year 1											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
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Step 10(a): Appoint Internal Technical Advisory Committee

What:

Appoint an Internal Technical Advisory Group consisting of the directors of all agencies whose activities effect and/or are affected by the urban forest.

Example of Internal Technical Advisory Group memberships for a typical mid-size city in Florida:
- Budget
- Transportation
- Stormwater
- Water
- Wastewater
- Solid waste
- Police
- Fire
- Natural resource management
- Parks and recreation
- Urban forestry (natural resources)

Why:

1. The Internal Technical Advisory Committee will be responsible for crafting the body of the urban forest plan in a manner consistent with the Public Committee's Vision and Goals and the city's Guiding Principles.
2. The Internal Technical Advisory Committee will be responsible for ensuring that the City's urban forest plan is integrated into the formal and informal processes, functions and operations of the City government.

Who:

City Administration and City Commission/Council

1. Effective interdepartmental coordination is essential for consistent delivery of urban forestry programs.
2. Directors, or their appointees should follow the process throughout the plan development process.

Directors need to recognize that they are responsible for, and will sign off on, the final urban forest management plan for the city.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
x	x										

Step 11: Develop Elements

What:

Develop one or more Elements (basic quantitative building blocks) for each of the Public Committee's Goals (qualitative).

Example:

Vision

The urban forest is abundant, diverse, healthy, and benefits the community.

Goal

1. The urban forest should predominantly reflect the diversity of the surrounding native forest.

Elements

- Canopy cover
- Invasive Species
- Abundance
- Standing Dead and Down Woody Material

See Appendix E for examples of Elements.

Why:

Elements, basic quantitative building blocks of the strategic plan, bring the broad qualitative goals that directly represent public values, into a quantifiable planning and operational framework.
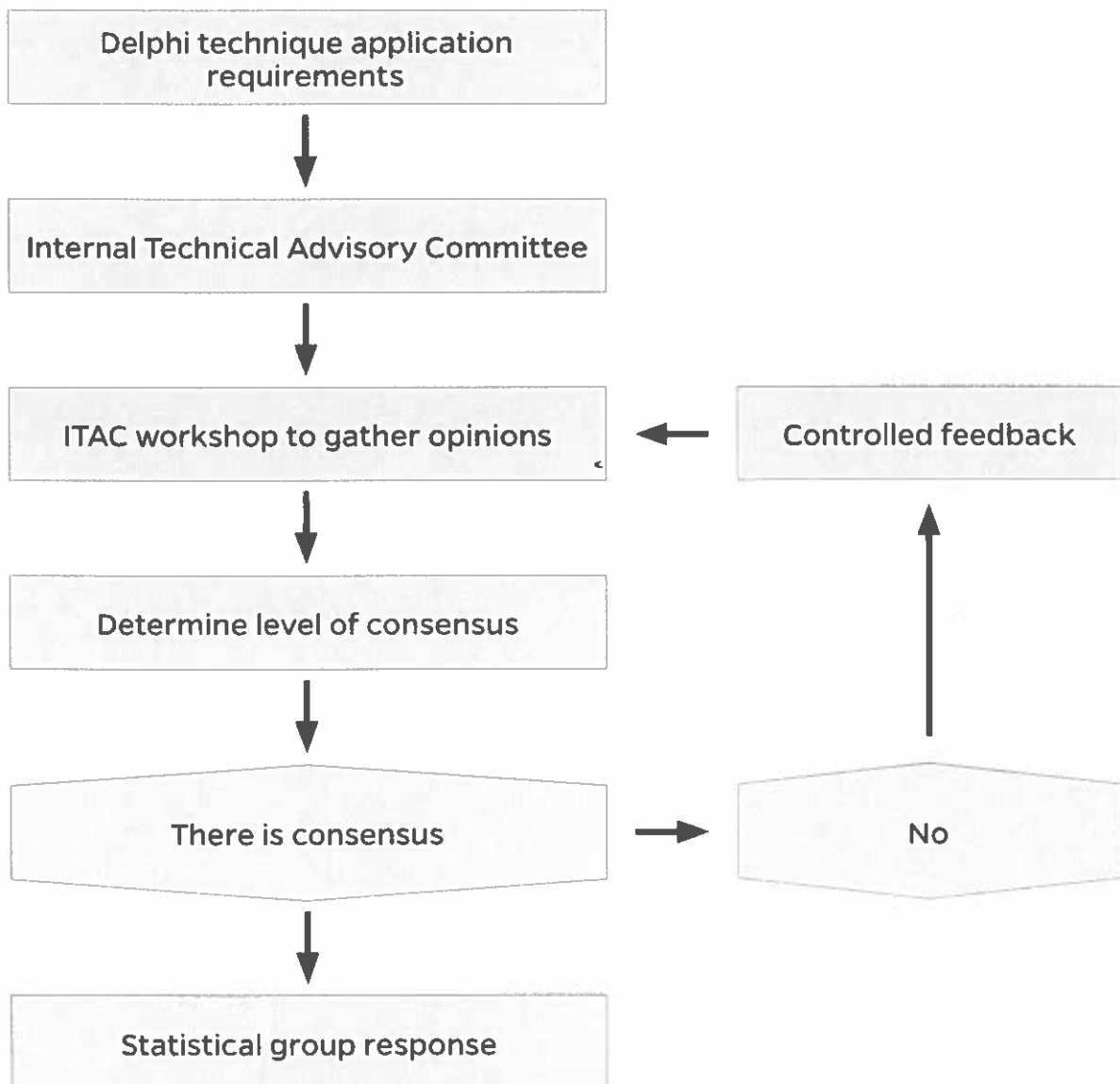
Who:

Internal Technical Advisory Committee

How:

Project Team guides a series of in-person consensus building sessions; may also use the **Delphi method** to reduce the number of in-person workshops.

See Appendix B for a description of Delphi method.

Our experience suggests...

1. The Delphi method reduces time on face-to-face meetings to aggregate opinions from a diverse set of experts, and it can be done without having to bring everyone together for a physical meeting.
2. The Delphi method is a process used to arrive at a group opinion or decision by surveying a panel of experts. Experts respond to several rounds of questionnaires and the responses are aggregated and shared with the group after each round.
3. The experts can adjust their answers each round, based on how they interpret the "group response" provided to them.
4. The ultimate result is meant to be a true consensus of what the group thinks.

```
┌─────────────────────────────────┐
│  Delphi technique application   │
│          requirements           │
└─────────────────────────────────┘
                │
                ▼
┌─────────────────────────────────┐
│ Internal Technical Advisory Committee │
└─────────────────────────────────┘
                │
                ▼
┌─────────────────────────────────┐      ┌──────────────────────┐
│ ITAC workshop to gather opinions │ ◄─── │ Controlled feedback  │
└─────────────────────────────────┘      └──────────────────────┘
                │                                    ▲
                ▼                                    │
┌─────────────────────────────────┐                 │
│   Determine level of consensus  │                 │
└─────────────────────────────────┘                 │
                │                                    │
                ▼                                    │
┌─────────────────────────────────┐      ┌──────────────────────┐
│       There is consensus        │ ───► │          No          │
└─────────────────────────────────┘      └──────────────────────┘
                │
                ▼
┌─────────────────────────────────┐
│    Statistical group response   │
└─────────────────────────────────┘
```

Delphi method for use in iterative engagement to reach consensus.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
	x										

Step 12: Determine Geographic Scale of Management

What:

Determine the appropriate geographic scale(s) of urban forest management units (i.e., land use, neighborhoods, planning districts, zoning districts, environmental justice areas, etc.) to achieve the Vision and Goals.

Why:

Working with planning districts, land use and/or neighborhoods allows the city the capability to identify site specific sets of long-term management objectives and short-term work plans. It also encourages the integration of urban forest management into the existing process fabric of city planning and operations.

Who:

Internal Technical Advisory Committee

How:

City planning typically takes place along planning districts boundaries; neighborhood boundaries; or census data tracts. Choosing the appropriate planning unit will vary from city to city.

> **Note**
> 1. The scale used should support achieving the Vision and Goals.
> 2. Choosing the appropriate planning unit will vary from city to city.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
		x	x								

Step 13: Develop Objectives

What:

Develop one or more specific and measurable Objectives for each of the Elements.

Why:

Objectives are specific intended outcomes of the Elements. They are written in the present tense and become the long-range measurable targets of management.

Who:

Internal Technical Advisory Committee

How:

Project Team guides a series of in-person consensus building sessions; and may also use the Delphi technique (see Appendix B) to reduce the number of in-person workshops.

Our experience suggests...

1. This is a key step that initiates the shift from a qualitative statement description of the future in the Vision and Goals to quantifiable objectives that lead to the definition of actions.
2. It is important to remember that just because an Objective is not presently quantifiable it does mean that it is not relevant or important and should be left out.
3. Use the Delphi technique (see Appendix B) to reduce the number of in-person workshops.

Residential district in New York City, NY.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
		x	x								

Step 14(a): Form Consensus on Internal Consistency

What:

Critically review the Elements and Objectives for consistency with the Vision, Broad Goals and Guiding Principles.

Why:

Ensure internal continuity and integration of the Vision and Goals, Guiding Principles, Elements and the Objectives.

Who:

Public Committee determine if the Elements and Objectives are consistent with the Vision, Broad Goals and Guiding Principles.

How:

The Project Team, with assistance from the Internal Technical Advisory Committee, facilitates the review and documents comments. A follow-up facilitated meeting (Project Team) of both committees should be used to formalize consensus, if necessary.

Our experience suggests...
- This review for consistency can more easily be achieved by looking for Elements and Objectives that are 'inconsistent' with the Vision, Goals and Guiding Principles.
- The Delphi process can be used to allow members of both committees to review and make initial comments.
- This is a critical point where the strategic planning process can breakdown if the two committees cannot be reconciled.
- This is an opportunity in the process to step back and review progress to date.

Year 1			Year 2								
Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep
x	x	x	x	x	x						

Step 14(b): Prepare and Distribute a Briefing Paper on the Plan To-date

What:

Prepare a briefing paper, with examples, demonstrating the consistency of the Vision, Goals, Guiding Principles, Elements and SMART Objectives. Place it on the city's dedicated urban forest management strategic planning website, release to news and social media outlets, place on the City's dedicated strategic planning web site, and workshop with City Administration and City Commission/Council.

Why:

Ensures that all government officials continue to have full and open access to the process and that the public continues to see that the strategic planning process is operating transparently and is consistent with societal values.

Who:

Project Team in cooperation with the Public Committee and Internal Technical Advisory Committee.

Natural area park, Tampa, FL.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
				x	x	x					

Step 15: Performance Indicators

What:

Develop a stepwise series of Performance Indicators for each Objective.

See Appendix E for examples of Performance Indicators, short- and long-term examples.

Why:

Quantifiable Performance Indicators enable measurement of progress toward the achievement of an Objective.

Who:

Internal Technical Advisory Committee

How:

1. Using the consensus Objectives, each member of the Internal Technical Advisory Committee drafts Performance Indicators on the Objectives most closely associated with their department's operational responsibilities. These draft Performance Indicators are then shared with all members of the Internal Technical Advisory Committee.
2. Project Team guides in-person workshops with the Internal Technical Advisory Committee to formalize consensus on the Performance Indicators and their language.

Our experience suggests...

- Performance Indicators are not management actions, but the outcomes of management.
- Identify the low and optimum performance indicators first, and then the moderate and good.
- There is no lead agency in this process—all members of the ITAC need to be engaged.
- Careful attention should be focused on the language of the Performance Indicators to ensure that they can be measured wherever possible.
- Pay close attention to the thresholds between adjacent Performance Indicators, they need to be clear and demonstrate a marked improvement in management outcomes.

					Year 2						
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
						x					

Step 16: Determine the Present State of Urban Forest Management Using the Performance Indicators

What:

Determine the present state of the urban forest system and its management.

Why:

Provide a baseline assessment of the urban forest's present condition and management relative to residents' expressed social values, and identifies points of departure for future City management activities.

Who:

Internal Technical Advisory Committee

How:

Use bio-physical inventory/analysis; social survey; other credible data; guiding principles and internal data from city departments to identify where the urban forest management program stands along the continuum of Performance Indicators for each of the Objectives.

Note
1. The tendency is for agencies to avoid giving themselves low marks. This will subvert the process and does not allow the future opportunity to recognize true progress in achieving management outcomes.
2. At times the present state is the optimal Performance Indicator.
3. Sometimes we are not sure of the present state.

Example:

Citywide

Element	Performance Indicators	Objective
Canopy cover (goal 1; element e)		Total tree canopy coverage is 50% or greater
Optimal	No statistically significant net loss of canopy cover since the 2016 Urban Forest Analysis	
Good	Canopy Cover is 45% or greater	
Moderate	Canopy Cover is 40% or greater	
Low	Canopy Cover is lower than 40%	

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
						x	x				

Step 17: Determine How Performance Indicators Will Be Monitored

What:

Determine how progress on each Objective will be measured for timing of implementation and effectiveness in advancing the sustainability of the City's urban forest. This includes the frequency of measurement and the agency responsible.

Examples of monitoring implementation and effectiveness:
- Urban forest canopy – GIS or point sampling with aerial photography
- Stormwater function – 5-year cycle of iTree urban forest analysis
- Staff continuing education – departmental accounting reports
- Invasive species – 10-year cycle of natural areas assessments
- Energy reduction - % of new landscape plans that directly incorporate reduction of heat loading on buildings

Why:

1. Monitoring allows the City an opportunity to formally track the implementation of the 5-year operational plans; annual work plans; assess the effectiveness of the work undertaken; and demonstrate the continuing effort for process transparency. (See Appendix F)
2. Monitoring allows the City Administration an opportunity to report back to the City Council/Commission and the public on implementation of the Plan and progress on meeting intended outcomes.

Who:

Internal Technical Advisory Committee

How:

In cooperation with technical experts conduct a thorough review of data collection activities and timing of data acquisition for all Objectives.

Example:

Canopy cover – once every 5 years using USDA iTree tree cover assessment methodology (or other scientifically validated and inexpensive inhouse staff assessment)

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
						x	x				

Step 18: Identify a Concise and Specific Set of Management Actions for Each Objective

What:

Identify concise and specific recommendations and measurable actions intended to incrementally elevate each set of Performance Indicators from its present state toward the next highest level.

Who:

Internal Technical Advisory Committee

Why:

These actions will be evaluated for proper sequencing of projects, costs, personnel and lead department or agency. It will be used to guide the organization of the 5-year operational plan.

How:

The Project Team uses brainstorming techniques to guide the Internal Technical Working Group in the identification of a concise and specific set of actions intended to elevate each present state Performance Indicator.

Note
1. This should produce the full set of all valid actions and their sequencing that can elevate each set of Performance Indicators to its next highest level.
2. All valid actions are not to be judged by budget needs, resources, etc. at this time

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
							x				

Step 19(a): Form Consensus on the Preferred Set of Management Actions

What:

Form consensus on a preferred set of management actions that will constitute the city's 5-year Operational Plan.

Why:

This step sets the city's urban forestry operational agenda for the next 5 years, integrating it into the government's budget and administrative processes.

Who:

Internal Technical Advisory Committee

How:

The Project Team conducts a guided workshop(s) to refine suggested actions and form consensus on the final set of management actions that will constitute the first city's 5-year Operational Plan.

Note
1. These decisions must be made at the highest level of administrative authority in each department.
2. The Internal Technical Advisory Committee should be prepared to defend their rationale for the chosen actions.

Example:

Element	Performance Indicators	Objective
Canopy cover (goal 1; element e)		Total tree canopy coverage is 50% or greater
Optimal	No statistically significant net loss of canopy cover since the 2016 Urban Forest Analysis	
Good	Canopy Cover is 45% or greater	
Moderate	Canopy Cover is 40% or greater	
Low	Canopy Cover is lower than 40%	
Consensus Preferred Management Action(s) for the next 5 years		
1. Design and implement a canopy cover monitoring program– Public Works, Planning Depts. 2. Prepare a digital City of 'illustrated booklet' on tree care and maintenance Best Management Practices for inclusion on urban forestry web site – Public Works Dept.		

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
								x			

Step 19(b): Prioritize and Sequence Management Actions for the 5-year Operational Plan

What:

Prioritize and sequence actions in the 5-year Operational Plan.

Why:

In setting priorities and sequencing, consider the urban forest's contribution to the city's social, economic and environmental well-being; improving efficiency and effectiveness of urban forest management; and the opportunity for success in abating types, scope and severity of threats, key enabling conditions.

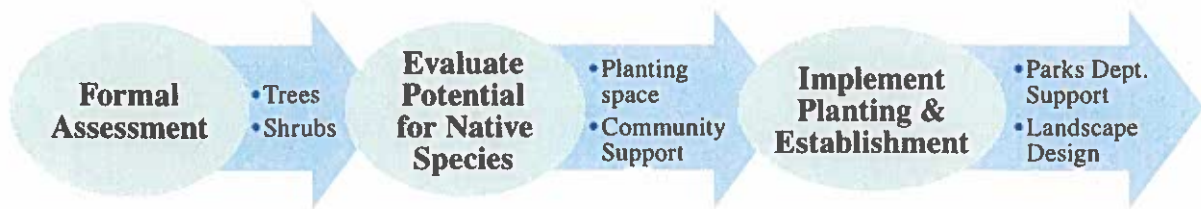**Who:**

Internal Technical Advisory Committee

How:

Review all proposed actions for cost, impact, and need for sequencing with other management actions.

Developed Parks/Open Space

Objective: Tree and shrub diversity reflect the native forest.

Optimal Performance Indicator: Net increase of native shrub and tree diversity in developed/open space land use type.

Formal Assessment → • Trees • Shrubs → Evaluate Potential for Native Species → • Planting space • Community Support → Implement Planting & Establishment → • Parks Dept. Support • Landscape Design

Example: Sequencing actions to reach a Performance Indicator.

3. Plan Re-engagement and Adoption

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
								x			

Step 20(a): Develop Consensus on Internal Consistency of the 5-year Operational Plan with the Strategic Plan

What:

Form consensus on the internal consistency and continuity of the plan with regard to the social and bio-physical analyses, Vision, Goals, Guiding Principles, Elements, Objectives, Performance Indicators, and 5-year Operational Plan.

Why:

This is the initial step in bringing the Public Committee and Internal Technical Advisory Committee back together to formalize agreement on the Strategic Plan.

Who:

Public Committee, Internal Technical Advisory Committee

How:

Project Team conducts a facilitated workshop of both committees to form consensus.

Alternatives for Action

Performance Indicators

Essential Elements & Key Objectives

Guiding Principles

Goals

Vision
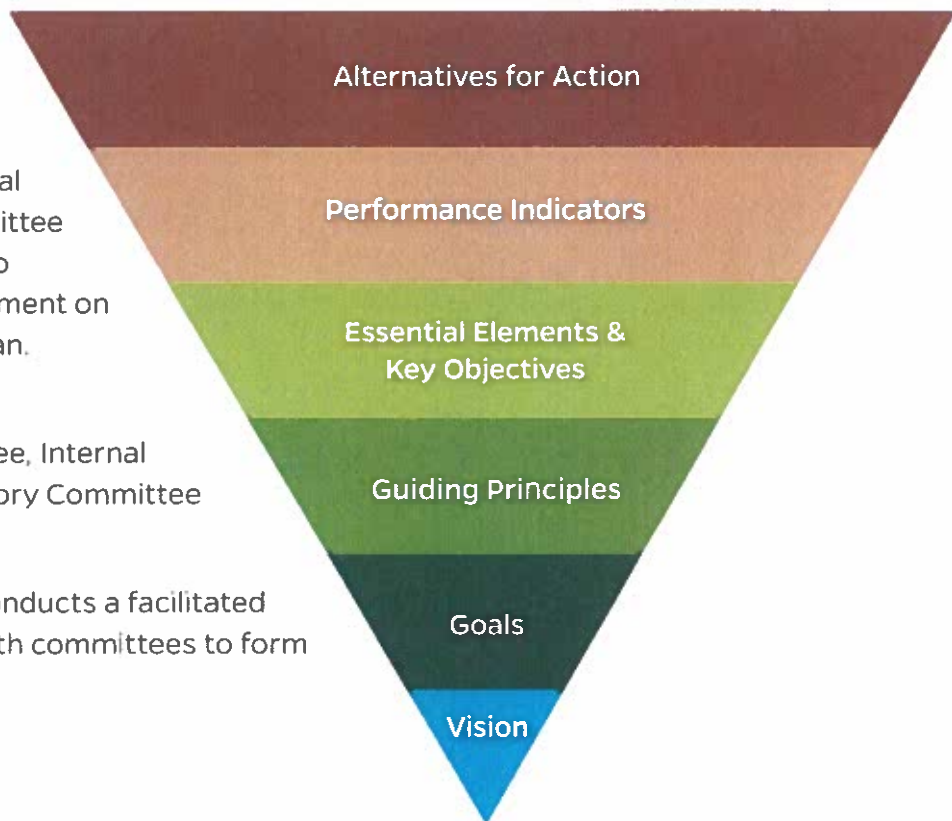
Note

1. The Delphi process in conjunction with the workshop to develop final consensus can be used.
2. The strategic planning process is now reaching into the micro level.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
								x			

Step 20(b): Prepare Interim Report on the Consistency and Continuity of the Plan

What:

Prepare interim report on internal consistency and continuity of the Plan. Place it on the city's dedicated urban forest management strategic planning website, release to news and social media outlets, and workshop with City Administration and City Commission/Council.

Why:

Ensure that all government officials continue to have full and open access to the process and that the pubic continues to see that the strategic planning process is operating transparently on this potentially contentious topic.

Who:

Project Team

How:

This interim report should be in the form of a short briefing paper.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
									x		

Step 21: Prepare an Interim Report on the Plan

What:

Prepare an Interim Report on the Urban Forest Management Strategic Plan, including the Operational Plan for the first 5-year cycle.

Why:

The Interim Report of the Strategic Plan for the Urban Forest Management Program will be used for technical reviews and checks on internal consistency with the Vision, Goals, Guiding Principles, Elements, Objectives, Performance Indicators and Actions.

Who:

Project Team

How:

Project Team, in cooperation with municipal agencies, develop the plan's structure and use existing narratives, briefing papers, inventories and analyses to organize the content.

Workshop for city administration and city council.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
										x	

Step 22: Workshop with Public Committee, City Administration and City Commission/Council

What:

Workshop the Interim Report on the Strategic Plan for the Urban Forest Management Program with the Public Committee, Internal Technical Advisory Committee, City Administration and City Commission/Council.

Why:

These workshops are intended to facilitate any last minute minor adjustments to the language of the Plan and provide the Public Committee an opportunity to ensure the Plan remains consistent with the Vision and Goals.

Ensure that all government officials continue to have full and open access to the process and that the public continues to see that the strategic planning process is operating transparently.

Who:

Project Team

How:

Distribute complete written and digital reports to all members. Conduct a series of presentations and discussions guided by the Project Team.

Note: Any last-minute changes to the plan, beyond clarification of language, are to be disallowed. All active participants have had numerous opportunities to express their opinions and work toward the integration of their ideas into the plan throughout the planning process.

Public workshop with city council.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
										x	

Step 23: Final Draft

What:

Produce a final draft of the Urban Forest Management Strategic Plan, including management operations for the first 5-year cycle.

Why:

Ensure that all government officials continue to have full and open access to the process and that the public continues to see that the strategic planning process is operating transparently and has opportunity to comment.

Who:

Project Team

How:

The final draft is edited by a professional editor; and graphic layout is designed by a professional familiar with formatting for print, digital media and social media.

Place on the city's dedicated urban forest management strategic planning web site, release to news and social media outlets and workshop with City Administration and City Commission/Council.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
											x

Step 24: Formally Adopt and Execute the Plan

What:

Formally adopt the Urban Forest Management Strategic Plan as the City's urban forest management plan

Who:

City Commission/Council and City Administration

Why:

Incorporation of the Urban Forest Management Strategic Plan into the city's Comprehensive Plan ensures that strategic plan is integrated into the foundational structure of the government. The issuance of the Executive Order (Mayor, Governor, etc.) directs all government agencies to directly participate in enacting the strategic plan and its subsequent operational plans.

How:

1. City Commission/Council approves the Plan as the City's Urban Forest Management Plan.
2. The City Urban Forest Management Plan is incorporated into the City's Comprehensive Plan.
3. An Executive Order is issued to initiate implementation of the City's Urban Forest Management Plan.
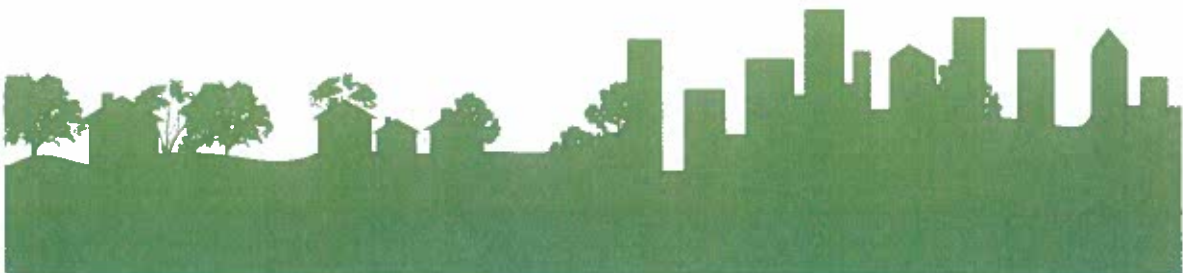
4. Plan Implementation and Accountability

Step 25: Create a Permanent Advisory Committee on Natural Resources

What:

Create a permanent Natural Resources Advisory Committee (NRAC), consisting of a balanced representation of the city's public social, economic, and environmental interests.

Why:

Ensure citizen values are continually represented in the refinement and implementation of the City's cycle of 5-year urban forest management Operational Plans.

Who:

City Commission/Council and City Administration

How:

In cooperation with the Planning Department, conduct a semi-annual review of progress in implementation of the 5-year Operational Plan (implementation monitoring).

In cooperation with the Internal Technical Working Group, annually prepare a written report on the implementation of the 5-year Operational Plan for the Mayor and City Commission/Council.

Note: Consider including a member(s) of the original Public Committee to ensure continuity between the planning and implementation phases of the urban forest management plan.

Step 26: Establish a Permanent Internal Technical Working Group

What:

Establish a permanent Internal Technical Working Group (ITAC) comprised of appointed departmental representatives to identify issues and make recommendations associated with the successful implementation of the Plan.

Why:

Identify procedural and process issues that impact the efficient and effective implementation of the City's current 5-year Operational Plan, identify successful strategies and recommend corrective actions and strategies.

In cooperation with the Advisory Committee on Natural Resources, annually prepare written report to the Mayor and City Commission/Council on implementation of the current 5-year operational Plan.

Who:

City Administration

How:

1. The committee meets regularly to review progress, identifies issues and makes recommendations associated with the successful implementation of the Plan.
2. The Planning Division Manager or Director of Planning and Development Department shall chair the Working Group.
3. Most of the work of this committee can be accomplished through the use of a modified Delphi process, reducing the need for workshops.

Our experience suggests...

- This step is crucial to the institutionalization of the urban forest management plan.

- The Director of Planning, or equivalent, because of the broad perspective their position inherently has, is in a good position to serve as the chair the Internal Technical Working Group.

Step 27 (repeat this Step during the 4th year of each 5-year Operational Plan cycle)

What:

Validation Monitoring and Development of subsequent 5-year Operational Plans.

Why:

In response to evaluation and new conditions, revise the operational plan following the 5-year interval of social and bio-physical assessments.

Who:

Internal Technical Working Group and Advisory Committee on Natural Resources, in cooperation with technical experts

How:

1. Starting in year-4 of the 5-year cycle facilitate consensus building session using Steps 2(a) – 4(b); 6; 10(b); 16; 17 and 19(a) to guide development of the next 5-year operational Plan.
2. Prior to contracting the 5-year Ecological System (bio-physical) Analysis and Social System Survey review the scientific methods and models to be used to characterize the urban forest and citizen values. Choosing appropriate forms of analysis will be extremely valuable in supporting management decision-making.
3. Prepare the 5-year Operational Plan for review by City Administration and City Commission/Council for formal adoption.

Note: Using our example of a 20-year long-range Strategic Plan with four imbedded 5-year short range operational plans, during the last 2 years of the fourth 5-year operational cycle, a new strategic planning process should be initiated.

Urban Forest Management; A Primer to Strategic Planning for Municipal Governments

Introduction

The purpose of this guide is to assist in the organization of a strategic plan for urban forest management. This guide was written specifically for use by people responsible for the initiation, or redesign, an urban forest management program. The methodology is flexible, adaptable and appropriate for town, city, county and state urban forest management program development. It was initially developed for use in the State of Florida but this framework can be applied universally.

An effective and sustainable urban forest management program must address three major components: **social systems, governance systems, and the ecological systems**. The **social component** provides the justification for the plan by demonstrating value to the people that live and utilize the forest. The **governance component** provides guidance to responsible entities on how, when and where management activities will occur. The **ecological component** addresses the dynamic nature of the system, which is the reason this process is different than simply managing other infrastructure such as transportation systems, sewer systems or electrical grids. As you might expect, the social and governance components add a level of complexity to the planning process not often encountered when developing an urban forest management program. Ideally these three components are integrated throughout the plan to inform government department procedures, policies, and other activities.

This guide will lead you through a series of steps to develop a long-range strategic plan* that will:

1. Identify the perceptions and values of the citizens;
2. Create a citizen-based vision for the urban forest;
3. Identify broad qualitative goals that define the vision;
4. Draw up guiding principles that define the limits of government purpose and action;
5. Identify quantifiable management objectives;
6. Implement plans (short range);
7. Develop annual work plans; and
8. Monitor implementation and effectiveness.

Strategic Planning Steps

The following 28 strategic planning steps represent a deliberative, iterative and inclusive process for the organization of a comprehensive urban forestry program. The resulting urban forestry program will be place-based, cooperative, multi-party and grounded in high-quality science.

1. Plan Initiation and Engagement (months 1-8)

Step 2(a):   Community Engagement
Step 2(b):   Design and Conduct the Ecological System (bio-physical)
Step 3:   Reports on Analysis of the Social Survey and Bio-physical Inventory/Ecological Analysis
Step 4:   Develop Guiding Principles
Step 5:   Announcement
Step 6:   Appoint a Public Committee
Step 7:   Workshop with Public Committee

2. Plan Development   (months 9-21)

Step 8(a):   Development of the Vision
Step 8(b):   Development of the Goals
Step 9:   Report Vision/Goals
Step 10(a):   Appoint Internal Technical Advisory Committee
Step 10(b):   Workshop Internal Technical Advisory Committee
Step 11:   Develop Elements
Step 12:   Determine Geographic Scale of Management
Step 13:   Develop Objectives
Step 14(a):   Form Consensus on Internal Consistency
Step 14(b):   Prepare and Distribute a Briefing Paper on the Plan To-date
Step 15:   Performance Indicators
Step 16:   Determine the Present State of Urban Forest Management Using the Performance Indicators
Step 17:   Determine How Performance Indicators Will Be Monitored
Step 18:   Identify a Concise and Specific Set of Management Actions for Each Objective
Step 19(a):   Form Consensus on the Preferred Set of Management Actions
Step 19(b):   Prioritize and Sequence Management Actions for the 5-year Operational Plan

3. Plan Re-engagement and Adoption   (months 21-24)

Step 20(a):   Develop Consensus on Internal Consistency of the 5-year Operational Plan with the
                Strategic Plan
Step 20(b):   Prepare Interim Report on the Consistency and Continuity of the Plan
Step 21:   Prepare an Interim Report on the Plan
Step 22:   Workshop with Public Committee, City Administration and City Commission/Council
Step 23:   Final Draft
Step 24:   Formally Adopt and Execute the Plan

4. Plan Implementation and Accountability   (months 24+)

Step 25:   Create a Permanent Advisory Committee on Natural Resources
Step 26:   Establish a Permanent Internal Technical Working Group
Step 27   (repeat this Step during the 4th year of each 5-year Operational Plan cycle)

FLORIDA URBAN AND COMMUNITY FORESTRY GRANTS

SUMMARY

Available annually to local governments, educational institutions, Native-American tribal governments and legally organized nonprofit (volunteer) organizations in the following categories:

- Public Tree Canopy Improvement (Tree Planting)

- Public Tree Inventory or Urban Tree Canopy Assessment

- Urban Forest Management Planning

- Urban Forestry Information and Education

Grants are a 50/50 match (50 percent federal/50 percent applicant) ; maximum grant allocation is $50,000 for each category and each applicant. No entity will receive a total amount of funding over the maximum single grant award ($50,000).   Employee salary may be used as matching funds. (only time spent on the grant project may be used as match).

Funds are allocated to recipients in January of the year following the award with a contract to begin work issued in March of the year following the award.

Administration includes a short quarterly progress report during the contract term and requires a final report at the conclusion of the contract.

Practices may be implemented on County owned lands, including parks or natural areas, as well as highway and street rights of way not maintained by the Federal government.

Funds will be allocated to regions with priority given to fiscally distressed communities.

TALLAHASSEE FL URBAN FOREST MASTER PLAN

September 2018

Fred Pope Review 3/15/2023

I. **CURRENT URBAN FOREST**
   A. Tree canopy Quality/ Species Composition
   B. Urban development trends
   C. Management approach
   D. Available resources
      1. Staff
      2. Budget
      3. Tree Inventory
   E. Regulations
      1. Landscape & Tree Protection Regulations
      2. Subdivision Regulations
         a) 1-4" tree or 2-4" trees up to 5000 sq ft of lot area
         b) 1-2" tree for each additional 2500 sq ft
   F. Overall Tree canopy/Urban Development Trends
      1. Overall canopy comparison with other cities
      2. Canopy cover by census blocks
      3. Canopy cover by land use
      4. Household income
      5. Population density
   G. Inventory of City Managed Trees (R.O.W., parks, other city lands
      3. Number of trees
      4. Condition
      5. Age
      6. Diversity
      7. Invasive species
      8. Tree conflicts with overhead utilities, hardscapes
      9. Wind resistance (Number & percentage of high, medium-high, medium-low and low resistant trees).
   H. Community involvement
      1. Community Players
      2. Neighborhood Engagement/ public awareness
      3. Green industry involvement
      4. Other groups/ private developers

II. **ANALYSIS OF STREET TREE ASSET MANAGEMENT**
   A. Available Urban Forestry Data and Tree Canopy Studies Prepared by Consultants
   B. Staffing
   C. Current Funding level
      1. Average budget for tree care
      2. Average budget per tree
      3. Average budget per capita
      4. Percent of total City budget

D. Budget Allocation per Task
    1. Maintenance
    2. Tree planting
    3. Staff
    4. Other
E. Budget per Management Area
    1. Street trees
    2. Park Trees
    3. Other Public Property
F. Comparison with Other Cities
G. Equipment
H. Policies and Procedures
    1. Formal Management Plan?
    2. Proactive or Reactive
I. Level of Strategic Planning to identify and implement tree planting projects that are targeted to support citywide goals, and address neighborhood tree canopy deficiencies
J. Level of communication with private and public entities

III. GOALS

A. Complete inventory of trees on public properties
B. Transition into Proactive Tree Maintenance and Planting Program
C. Evaluate and recommend improvements to development regulations regarding tree preservation, planting and maintenance
D. Develop city-wide tree planting program to:
    1. Improve tree species and age diversity
    2. Equitably allocate of tree planting to under-served, and low-income areas with deficient tree canopy, and drainage issues.
E. Emphasis planting of species which are long-lived, wind-resistant, and have other beneficial qualities
F. Set goal to achieve an urban forest composed of no more than 10% of one tree species, 20% of one genus, and 30% of any family.
G. Set annual planting benchmarks
H. Increase the diversity of trees available from wholesale nurseries
    1. Encourage wholesale tree growers to grow species reflective of City's Preferred Species List by the use of incentives such as contract growing
    2. Increase public demand for underutilized desirable trees by educating the public and developers about the benefits of these trees
    3. Share with nurseries the estimated number of trees per species that will be planted by the City over a period of years.

Jacksonville Tree Commission
Urban Forest Master Plan Committee Minutes
Thursday, April 20, 2023, 9:30 AM
For Approval May 17, 2023

Ed Ball Bldg., 10th Floor, Conference Room 5

Attendees:

Susan Fraser, Tree Commissioner   Cindy Chism, Staff
Justin Gearhart, City Arborist
Nancy Powell, Scenic Jacksonville
Kathleen McGovern, Parks Dept.
Scott Sauder, JEA

1. **Call to Order** – Ms. Fraser

2. **Roll Call** – Cindy Chism

3. **Review of Stakeholder Perspective Identified from March Meeting** – Susan Fraser

   a. Notes from previous meeting (Attachment A).

4. **Scope of Work Discussion (Attachment B) – Big Picture** – Susan Fraser

   a. The goal of Committee is to write a scope for an Urban Forest Master Plan (UFMP) that is reflective of the unique nature of the City's geographic scale , diverse land use types and acknowledges the available data. That scope can then be used by staff to generate a general cost estimate for preparation of the UFMP that can be used to develop a budget amount.

   b. It was agreed that the UFMP would cover aspects of the urban canopy that was outside the current funding source of tree mitigation revenue; the scope would not include just tree planting but also education, maintenance, protection etc.

   c. Mr. Gearhart pointed out that the current revenue for tree planting is restricted to planting on public land ; without including trees on private land in the UFMP the impact of the UFMP on the tree canopy will be minimal, as most of the tree canopy and the urban forest is located on private property.

   d. Ms. Fraser noted that the way to move the needle on support for the tree canopy located on private property is education. If we are going to change how the private property tree canopy is managed there must be public consensus about what that looks

like and that is achieved through outreach and education. We must have public support for any changes in the way we support the tree canopy.

5. **Typical Table of Contents of an Urban Forest Master Plan**

    There was general discussion about the sections of a typical UFMP; a table comparing the Table of Contents of several adopted UFMPs was shared.

6. **Guidance for Staff for Draft Scope of Work**

    There was general discussion of the information necessary to allow for an accurate cost estimate for the scope of work to be developed, including:

    a. Who will be the manager of this document, and this process? Is it the Tree Commission and its staff? Is there a separate board to do this? Ultimately the UFMP is a planning document through the Public Works Department who supervises the Tree Commission. Will the scope include iterative review by the Tree Commission at critical points in the process? How many reviews/ meetings?

    b. Will the Urban Forestry Manager be the Project Manager?

    c. Does the Staff work with the consultant and then bring a final document to the Tree Commission for approval or disapproval?   Mr. Gearhart said generally it's not just 1 meeting to have an idea and then a consultant or staff put something together, that a successful plan will include a constant interaction between the various stakeholders. Mr. Gearhart described the process recommended at the UFMP Workshop he attended recently: 1) there is the public portion that includes a public committee made up of stakeholders in the public who are interested; this committee provides input toward the big picture goals; 2) using that big picture, a technical report is developed with the various technical stakeholders involved in the development of a draft report. The internal technical committee will generate a draft plan and present it to the public committee. Once there is an agreement between the public stakeholders and the internal technical committee, the UFMP can be finalized.

    d. Ms. Fraser asked that Mr. Gearhart develop a draft scope incorporating the consensus of the Committee on the Big Picture questions presented and generally follow the process described. It was agreed by those present that the first phase of any UFMP for the City should be a review of the data and the process and programs that have been implemented so that recommendations can be made as to the need for additional data (or not) and a comparison of the process and programs with those of other jurisdictions presented. This first phase would assess what we have and identify what is necessary to go forward with the development of an UFMP for the City.

7. **Funding Options**

    a. Ms. Fraser acknowledged that the restrictions placed on expenditure of the tree mitigation funds is limiting the Tree Commission in fulfillment of its adopted duties. She suggested that exploring support for changes to the current restrictions should be a part of the funding discussion for the UFMP and for additional staffing to support the duties of the Tree Commission. Discussion with the settlement parties Ms. Grandin is the place to start; if consensus and support for legislation to amend the current restrictions can be generated, this might be a piece of the funding strategy.

    b. Mr. Gearhart suggested that a clear plan to address funding should be developed so as not to pursue multiple approaches and diluting or dividing support for multiple approaches.

    c. Ms. Powell suggested meeting with CM Salem and discussing the funding options with him for guidance.

8. **Discussion Items for Subsequent Committee meetings**

    a. There was discussion and consensus that Mr. Gearhart draft a scope of work for the entire Urban Forestry Master Plan, following a typical table of contents with modification to reflect discussion under Items 4, 5 and 6 and providing as much detail as his time permitted, to allow this committee to provide comments on his initial draft. Ms. Fraser and Mr. Gearhart plan to meet to review the initial draft scope before the next Committee meeting.

    b. The agenda for the next meeting will focus on building consensus for a scope of work for an UFMP for the City to be forwarded to the tree Commission at its June meeting for further review and discussion.

9. **Adjourned.** The next meeting will held Thursday, May 18th at 9:30 am and will be an in person meeting in Ed Ball Building, 10th Floor, Public Works Office, conference room 5.