

Volume 2

Appendices to the Recommended Draft Report to City Council



Citywide Tree Policy Review and Regulatory Improvement Project



City of Portland
Bureau of
Planning and Sustainability
Sam Adams, Mayor
Susan Anderson, Director

Recommended Draft to Portland City Council
December 2010



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Recommended Draft • Volume 2

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Appendix A

**Staff Memorandum and Recommendations to Portland
Planning Commission and Urban Forestry Commission
(July 14, 2010)**



City of Portland
Bureau of
**Planning and
Sustainability**

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July 14, 2010

TO: Portland Planning Commission and Urban Forestry Commission
FROM: Roberta Jortner, Morgan Tracy, and Stephanie Beckman
SUBJECT: Citywide Tree Policy Review and Regulatory Improvement Project - Staff Recommendations

Attachments:

- A. Citywide Tree Project Tracking Table and Staff Recommendations – July 14, 2010
- B. Public Involvement Log – July 14, 2010
- C. Citywide Tree Projects – Estimated Tree Canopy and Costs, July 14, 2010
- D. Tree Project Overview – July 14, 2010

Staff Recommendations:

1. ***Approve the recommendations presented in the Citywide Tree Project Tracking Table and Staff Recommendations to the Planning Commission and Urban Forestry Commission(Attachment A)***

The *Project Tracking Table and Staff Recommendations* (Attachment A) presents a comprehensive outline of the code sections proposed to be amended through this project and staff recommendations for action by the Planning Commission and Urban Forestry Commission. It includes the code sections addressed during the Planning Commission and Urban Forestry Commission work sessions held in April, May and June of 2010. It also contains all the other code sections proposed to be amended through the project. The commissions agreed that they would not discuss the other code sections during their work sessions due to time constraints, and because these sections do not raise major policy issues or cost concerns.

2. ***Direct staff to revise the proposal and produce the Recommended Draft for public review and City Council action this fall.***
3. ***Endorse the phased project implementation and funding strategy outlined on page 9 of this memo.***

Background

The Citywide Tree Project began in fall 2007. Project phases included:

- **Scoped project with community input;** **fall 2007/winter 2008**
Researched other jurisdictions' tree regulations;
drafted issue papers
- **Worked with Stakeholder Discussion Group** **spring/fall 2008**
Examined key issues; evaluated potential solutions
- **Vetted initial solution package** **winter 2008/spring 2009**
Planning Commission, Urban Forestry Commission,
Development Review Advisory Committee, Citywide
Land Use Group, Planning/Development Directors
- **Produced Proposed Draft; assessed fiscal impacts** **spring 2009/winter 2010**
Collaborated w/City bureaus; consulted City Attorney
- **Planning Commission/Urban Forestry Commission** **winter/summer 2010**
public hearing, work sessions, recommendations

The Bureau of Planning and Sustainability released the Proposed Draft of the *Citywide Tree Policy Review and Regulatory Improvement Project* to the Portland Planning Commission and Urban Forestry Commission February 17, 2010. The Proposed Draft is comprised of three volumes: Volume 1 Project Report, Volume 2 Proposed Code Amendments, and Appendices. Staff provided numerous briefings to the Citywide Land Use Group, Development Review Advisory Committee, the Homebuilders Association, and a number of neighborhood organizations. Staff also held two public open houses on March 9th and March 16th, 2010.

The Planning Commission and Urban Forestry Commission opened a joint public hearing on March 23, 2010. The commissions held joint work sessions on April 13, April 27, and May 11. The Planning Commission held a separate work session on June 8. The Urban Forestry Commission also held a separate work session on June 17, 2010.

During the work sessions the commissions discussed and provided initial direction on the major substantive elements of the project proposal. Staff outlined these elements in a Work Session Discussion Guide. For each of the key proposal elements, the Discussion Guide outlined the intended purpose and benefits, comments received in public testimony, and specific questions for Planning Commission and Urban Forestry Commission consideration. The Discussion Guide was updated after each work session to reflect direction from the commissions, and to present discussion items for the next work session. The Discussion Guides and PowerPoint presentations were posted on the project website after each work session.

Staff also produced a comprehensive Citywide Tree Project Tracking Table that outlines all of the proposed code amendments contained in the Proposed Draft. It included the substantive elements contained in the Work Session Discussion Guide, as well as proposed code amendments that the Planning Commission and Urban Forestry Commission reviewed but did not discuss during the work sessions. The Project Tracking Table was updated after each of the work sessions and posted on the project website. The July 14, 2010 version of the Project Tracking and Staff Recommendations Table presents the full set of recommendations for Planning Commission and Urban Forestry Commission approval, and is provided as Attachment A.

The commissions kept the public hearing record open during the April, May and June work sessions. They invited comments at the work sessions, and accepted written comments as well. In addition to the required mailing notice, staff sent electronic mail messages to notify those on the project mailing list that the public hearing remained open and the commissions were continuing to accept testimony. The Planning Commission closed its hearing on June 8th. The Urban Forestry Commission has not taken official action to discontinue public input on the proposal. Public

testimony provided verbally during these sessions is summarized in meeting minutes. The meeting minutes and additional written public testimony were distributed to both commissions and are posted in the "Documents and Resources" section on the project website, www.portlandonline.com/bps/treeproject. The public involvement log for the project is provided as Attachment B.

Staff has also prepared a report titled Public Comment and Staff Response Report (June 21, 2010). In this report, comments raised in the public testimony are organized and generally follow the key topic areas from the Discussion Guide. The staff responses address the comments or groups of comments for each key topic area. The responses provide explanations or clarifications of the project proposal and how it addresses concerns raised. The responses also describe how the February draft proposal will likely be revised in the next draft to address public concerns and to reflect direction provided by the Planning Commission and Urban Forestry Commission during their work sessions. This report is posted on the project website: <http://www.portlandonline.com/bps/index.cfm?c=52162&a=305972>.

Overview of Planning Commission and Urban Forestry Commission Review and Staff Recommendations:

The Planning Commission and Urban Forestry Commission received extensive comments on the Proposed Draft (February 2010) from neighborhood associations, developers and consultants, arborists, architects, environmental organizations, and Portland residents. City bureaus also provided detailed comments and suggestions on the project proposal. The following comment "themes" emerged during the public hearing and work sessions:

1. Support for consolidating the tree regulations into a new Title 11 Trees and treating trees as part of Portland's 'green infrastructure'
2. Support for stronger tree preservation, planting and protection requirements, flexible development standards to encourage tree preservation, consistent requirements for trees in environmental zones, and improved enforcement of tree rules
3. Concern about loss of large trees and groves of trees; interest in promoting native trees
4. Concern about impacts of the proposed tree preservation and protection standards on development costs and feasibility, particularly on smaller lots, and impacts on housing density and affordability
5. Support for a more standard tree permit system; desire for the permit system to be simple and non-onerous, concern about how the proposal would apply to homeowners
6. Varying views on tree size thresholds for permitting and development standards
7. Support for more standard replacement of trees removed, including dead, diseased, dangerous trees; mixed viewpoints requiring replacement of nuisance tree species
8. Support for proposed customer service improvements including: single point of contact for tree information, 24-hour tree hotline, community tree manual, and neighborhood tree plans
9. Concern about the complexity and cost of the proposal, especially given the current economic downturn and City budget cuts; requests to simplify and reduce cost

A variety of other comments and concerns were received, ranging from how the City Tree Fund is administered to how proposed restrictions on planting identified nuisance tree species, particularly Norway Maple, would affect the character of Portland's streets and the historic character of Ladd's Addition. Specific code suggestions were provided as well.

Based in part on testimony from the public and input from City bureaus, staff arrayed the key elements of the project proposal into the Planning Commission/Urban Forestry Commission Discussion Guide. Elements addressed in the Work Session Discussion Guide included:

I. Trees in Development Situations

- Ia. Trees in Land Use Reviews
- Ib. Trees in Building Permits - Tree Preservation Standards
- Ic. Trees in Building Permits - Tree Density Standards
- Id. Trees in Building Permits – Protecting Trees on Property Lines & Adjacent Sites during Construction
- Ie. Trees in Environmental Zones
- If. Trees in Public Works and Capital Improvement Projects

II. Trees in Non-Development Situations

- Ila. Permits for City Trees, Street Trees and Trees on Private Property
- Ilb. Pruning Permit in Environmental Zones
- Ilc. Programmatic Permit
- Ild. Requirements for Dead, Diseased, Dangerous and Nuisance Trees

III. Code Consolidation and Restructuring

IV. Customer Service Improvements

- IVa. Single Point of Contact
- IVb. 24-hour Tree Hotline
- IVc. Community Tree Manual
- IVd. Improved Permit Tracking System
- IVe. Neighborhood Tree Plan

In light of the testimony, cost and budget issues, and initial feedback from the two commissions, staff from the bureaus of Parks and Recreation, Development Services, Environmental Services, Transportation and Water worked with Planning and Sustainability to simplify and reduce the costs of the proposal, while striving to retain improvements in tree preservation and future tree canopy across the city. The staff also met with the directors of Parks and Recreation, Development Services, Environmental Services and Planning and Sustainability to discuss key policy, implementation and budget issues, and proposed revisions to the proposal.

During the work sessions, staff asked the Planning Commission and Urban Forestry Commission for initial direction and unofficial approval for elements presented in the Discussion Guide and suggested revisions to the proposal. Staff also presented revised project implementation cost estimates and projected increases in tree canopy that would result from additional tree preservation or planting required by the proposal. As shown in Attachment C, the revised regulatory improvement components of the proposal are still projected to generate significant tree canopy benefits over time, at roughly half the cost of the original proposal. Staff noted that more than 90 percent of the canopy benefits (approximately 115 additional acres preserved or planted per year) and about 80 percent of the regulatory improvement costs are associated with trees in development situations. These costs would be covered through modest increases in building permit and land use review fees. The estimated increase in building permit fees is approximately \$60, averaged across all affected permits. Land use review fee increases are estimated to range from approximately \$65 to \$300. The Tree Permit System and proposed Customer Service Improvements would be funded largely through the general fund or alternative sources (e.g., special assessments, grants). Ongoing general fund needs for the Single Point of Contact and 24-hour Tree Hotline are estimated to be approximately \$120,000. Additional one-time funding of approximately \$220,000 is also needed for start-up costs, including updating the City's permit tracking system, and to produce the Community Tree Manual.

Initial direction from the Planning Commission and Urban Forestry Commission is summarized below. Initial commission "endorsements" reported below do not represent official votes, nor do they represent consensus among commission members. Still, there seemed to be general agreement among the commission members on most issues. Areas of agreement and

disagreement helped staff shape the recommendations summarized below and specified in Attachment A.

I. Trees in Development Situations

- Ia. Trees in Land Use Reviews** – The commissions endorsed a revised proposal for trees in land use reviews. The proposal includes improved tree preservation criteria and standards for land divisions, requirements to record tree plans with final plats, and an expiration date for approved tree plans. The commissions also endorsed the addition of tree preservation as a factor to consider in Design Reviews and certain Conditional Use Reviews and associated Conditional Use Master Plans.

See Attachment A pgs 15-18: Title 33.600 series (Land Division), 33.700 series (Administration and Enforcement), 33.800 series (Land Use Reviews).

- Ib. Trees in Building Permits: Tree Preservation Standards** – The commissions endorsed a simplified version of the tree preservation standard. This standard provides an incentive to preserve trees, and yields additional tree canopy through mitigation when trees are not preserved.

The simplified standard would require preservation of 35 percent of the trees 12 inches in diameter and larger. Development on lots equal to or smaller than 3000 square feet or on lots where the proposed building coverage is equal to or greater than 90% would be exempt from the Tree Preservation Standards. Projects that are exempt from preservation standards would still need to meet Tree Density Standards. Some commissioners questioned the exemptions, however most seemed to agree with staff that the exemptions improve the balancing of City goals for the urban forest and for development. The exemptions would also reduce implementation costs.

To align with the proposed revisions for tree permits for homeowners on built out single family lots, Staff has also recommended exempting tree preservation requirements for additions to single family homes. Tree Density Standards would continue to apply to these situations, as described below (Ic.).

The simplified tree preservation standard continues to allow applicants to choose mitigation instead of meeting the standard. The commissions reviewed a simplified 2:1 “plant or pay,” mitigation option for each tree removed below the 35 percent preservation requirement. Based on additional evaluation, staff recommends that the commissions approve a “pay only” mitigation option to simplify and reduce costs of implementation, and to prevent over-planting of development sites with trees. Staff is also recommending that a minimum tree preservation timeframe after the development has been completed be further evaluated to address potential gaps between development and non-development requirements.

In response to public comments regarding the importance of native species, staff recommends the tree preservation standards include an incentive to retain smaller native trees by allowing 6” and greater natives to count toward preservation requirements.

The commissions endorsed a spot-check inspection approach for the Tree Preservation and Tree Density Standards (below) to reduce implementation costs.

See Attachment A pgs 9 & 10: Title 11.600.060, Tree Preservation Standards.

- Ic. Trees in Building Permits: Tree Density Standards** – The commissions endorsed the Tree Density Standard in concept, and directed staff to continue working to simplify the approach. Staff has since developed a simpler approach that is more akin to the existing “T1” zoning code standards that currently apply to new single family development. The “tree unit” concept in the Proposed Draft would be replaced with requirements for small, medium, and large canopy tree types already used for other landscaping standards. The

standard would apply to all development types for new construction, additions greater than 200 square feet and alterations that trigger non-conforming upgrades. The number of trees required for a given site area would vary by development type.

See Attachment A pg 10: Title 11.600.070, Tree Density Standards.

- Id. Trees in Building Permits – Protecting Trees on Property Lines & Adjacent Sites during construction** – The commissions endorsed staffs’ recommendation to scale back the initial proposal for protecting trees on property lines and adjacent sites. The revised proposal would encourage preservation of trees on property lines by allowing them to count toward tree preservation and density standards if their roots are protected. The revised proposal would also require trees on adjacent sites to be identified and considered during review of land divisions and public projects. Staff will develop provisions to allow limited encroachment into root protection zones for greater flexibility, and will provide educational materials to encourage protection of off-site trees and trees retained on a voluntary basis.

See Attachment A pgs 9 & 10: Title 11.600.050, Tree Plan Submittal Requirements and 11.600.080, Tree Protection Standards.

- Ie. Trees in Environmental Zones** – The commissions endorsed code amendments to require replacement of trees 6 inches and larger in diameter, specifically non-native non-nuisance trees, and trees in transition areas. The commissions endorsed amendments to existing definitions to ensure that stream and wetland setbacks are applied consistently in existing environmental zones. This will improve protection for trees in riparian corridors.

See Attachment A pgs 13 & 18: Title 33.430, Environmental Overlay Zones and 33.910, Definitions

- If. Trees in Public Works and Capital Improvement Projects** – The commissions endorsed the proposal to standardize consultation with Urban Forestry staff during design of public works and capital improvement projects. The commissions also agreed with a proposal for 1:1 tree replacement when trees are removed from partially and unimproved public rights of way, as well as providing the City Forester discretion to modify the mitigation requirement if it is disproportional to the impact.

See Attachment A pgs 9 & 10: Title 11.600.050, Tree Plan Submittal Requirements

II. Trees in Non-Development Situations

Ila. Permits for City Trees, Street Trees and Trees on Private Property

City Trees and Street Trees – The commissions endorsed the proposal generally, including a proposed revision to establish a 3-inch diameter tree size threshold to trigger permitting requirements. The proposal would continue to require a permit for pruning, removal and planting of City and Street trees, but would also establish certain pruning activities, such as small branches and removal of sucker shoots, that would be exempt from permit requirements. The proposal modifies the appeal process to be consistent with the process for trees on private property.

See Attachment A pgs 5 & 6: City Trees and Street Trees, Title 11.400.070-090 Tree Permits.

Trees on Private Property – The two commissions expressed differing views on the proposal to establish a standard tree removal permit system for trees on private property. The Planning Commission endorsed a revised staff proposal that would require a permit to remove any tree 12 inches in diameter and larger (6 inches in diameter for resource areas). The system would apply to all properties equally, including single family lots that are currently exempt from the City’s tree permit system. Tree-for-tree replacement would be required for dead, diseased, dangerous and nuisance trees, and for removal of up to 4 healthy trees that are 12 to 20 inches in diameter. Escalating tree replacement would be required to discourage removal and/or mitigate for removal of healthy trees 20 inches in

diameter or larger (3:1 replacement), or removal of more than four healthy trees 12 inches in diameter or larger (up to inch-for-inch replacement). The Planning Commission endorsed suggestions to simplify the process, including reliance on documentation from private arborists and use of a spot-check approach to reduce inspection costs. The Planning Commission also recommended that the permit for homeowners be free, at least in the near-term.

The Urban Forestry Commission expressed mixed views on the Private Tree Permit proposal. Urban Forestry Commission Policy Committee members expressed initial support for the standardized permit (i.e. a single permit system that would apply the same rules to all types of properties in the city). Other commission members did not support requiring a permit for homeowners to remove trees on their property.

Revised Recommendation – Homeowner System

Given the range of opinions, and the general sensitivity about requiring homeowners to obtain permits, staff is recommending an alternative Private Tree Removal Permit approach. This alternative still simplifies the current system and addresses trees on all property types, but would create a separate approach specifically to engage homeowners.

Homeowners would be urged to contact city staff before removing trees greater than 6 inches in diameter. City staff would check the property information to help prevent inadvertent tree violations. If no special conditions or regulations apply, staff would notify the owner that they may remove the tree, and would provide information or other possible incentives to encourage tree replacement. To remove a tree 20 inches in diameter and larger, homeowners would obtain a simple permit and replace each tree with one tree. The City Forester could waive tree replacement for lots with sufficient trees. There would be no review and no public appeal. The homeowner tree permit proposal is shown in Table 2 below.

The approach shown in Table 1 would apply to all other situations, e.g., trees on multi-family, commercial or industrial properties, vacant single family lots, or single family lots that are large enough to create additional building sites. Initial screening would be done by the single point of contact. Existing complications relating to trees on corner lots would be eliminated.

PRIVATE TREE PERMIT SYSTEM

Table 1. Standard System		
	Mitigation	Appeal
Confirmation:		
Dead, Diseased, Dangerous, w/in 10' of bldg.	1:1	Applicant
Nuisance Species		
4 trees 12-20"/year		
Review:		
≥20" healthy	3:1	Applicant & Public
≥5 healthy trees	up to caliper inch:inch	

Table 2. Homeowner System*
<p>"Call before you cut" To remove a tree <20" diameter, call 503-823-_____ or go online www._____ :</p> <p><u>The City will:</u> 1. Record in TRACS (permit tracking system) 2. Check for eligibility, conditions or other regs 3. Send "all clear" form or refer to correct process 4. Send tree planting/promo info, coupons, etc. <i>No tree replacement required</i></p>
<p>"Cut a tree – plant a tree" To remove a tree ≥20" diameter (or ≥6" in resource areas**): <i>Replace each tree with 1 tree</i> (Applicant may appeal)</p>

*Applies to built-out lots in single family zones and single family uses on lots ≤3,000 square feet in other zones
 ** Environmental and PV natural resource zones, Johnson Creek, Rocky Butte Plan Districts, etc.

See Attachment A pgs 7 & 8: Title 11.500.060-090 General Private Tree Permit Requirements

Iib. Pruning Permits in Environmental Zones – The commissions endorsed the proposal to allow limited native tree pruning in environmental zones, subject to a tree permit and oversight by a private arborist.

See Attachment A pgs 7 & 13: Title 11.500.060-090, General Private Tree Permit Requirements and 33.430, Environmental Overlay Zones

Iic. Programmatic Permit – The commissions approved a revised Programmatic Permit proposal. The revised proposal clarifies that only routine public agency and utility tree maintenance activities would be allowed under this permit. Based on concerns expressed by the City Forester and feedback from the Urban Forestry Commission, staff is recommending that removal of healthy non-nuisance trees 6 inches in diameter and larger not be allowed under a Programmatic Permit. The revised proposal also requires permit holders to submit annual activity reports to the City Forester, and requires the City Forester to report on pending Programmatic Permit applications and annual activity reports at monthly Urban Forestry Commission meetings. The City Forester may revoke a permit for non-compliance and enforcement procedures would apply to permit violations.

The commissions accepted the staff recommendation to explore a Tree Management Permit for ongoing private tree management activities for uses such as golf courses. The Planning Commission noted that eligibility for such a permit should be carefully limited, possibly by land use or site size. Both commissions directed staff to develop additional detail for review by the public and City Council in the revised proposal.

See Attachment A pg 3: Title 11.300.070, Programmatic Permit Application Requirements and Procedures

Iid. Requirements for Dead, Diseased, Dangerous and Nuisance Trees – The commissions endorsed the proposal to require replacement of dead, diseased, dangerous and nuisance trees. Staff is not recommending special code provisions to allow planting of Norway maples on City streets or in Ladd's Addition Historic District. Rather, staff recommends that Urban Forestry continue working with stakeholders to identify suitable replacement species, refine historic district guidelines as needed, and develop an approved street tree list specific to Ladd's Addition to ensure consistent tree replacement in this unique area. Staff also proposes to include consideration of historic district character and design guidelines in the list of factors the City Forester must consider when reviewing street tree permit applications.

See Attachment A pgs 5-8: City Trees and Street Trees, 11.400.070-090 Tree Permits and 11.500.060-090, General Private Tree Permit Requirements.

III. Code Consolidation and Restructuring – The commissions endorsed consolidation of City tree regulations into a new Title 11, Trees.

IV. Customer Service Improvements

- IVa. Single Point of Contact
- IVb. 24-hour Tree Hotline
- IVc. Community Tree Manual
- IVd. Improved Permit Tracking System
- IVe. Neighborhood Tree Plan

The commissions endorsed proposed Customers Service Improvements as important elements to the success of the project proposal.

A brief overview of the entire project proposal is provided in Attachment D. Note: Both commissions and implementing bureau directors have expressed a strong interest in tracking and reporting on project implementation, including tree preservation, removal and planting information and trends, how the codes are working, and whether changes are needed. A more complete outline of recommended program monitoring and evaluation activities will be developed for public review and council consideration in the revised proposal.

Phased Project Implementation and Funding Strategy

As reported, the Citywide Tree Project recommendations evolved substantially as a result of the Planning Commission and Urban Forestry Commission public hearing and work sessions. The Bureaus of Planning and Sustainability, Development Services, Parks and Recreation, Environmental Services, Water, and Transportation worked collaboratively to address key concerns raised by the public and the bureaus. Proposed revisions are intended to support and balance City goals for the urban forest and watershed health, development, affordable housing, compact urban form, neighborhood livability and social equity. Staff also worked hard to simplify and reduce the cost of the initial proposal, while maintaining most of the projected tree canopy benefits (see Attachment C).

Acknowledging the staffing, training, and outreach needs that must precede enactment of the proposed rules and given current economic and budget challenges, the Citywide Tree Project bureau partners recommend a phased implementation and funding approach as follows:

1. Request City Council approval of the revised "Recommended Draft" in fall 2010;
2. Request City Council to approve and budget the Customer Service Improvements and other one-time start up costs for FY 2011-12;and
3. Request City Council to make code amendments effective FY 2012 – 13, pending Council confirmation of the budget and allocation of funds and fee changes required to implement the regulatory improvements.

This phased strategy will allow time to develop information and outreach materials, and to connect with Portland residents, arborists, and developers about the upcoming rule changes. The phasing will hopefully provide the time needed for reasonable recovery of the local economy and the City budget. The Planning Commission and Urban Forestry Commission expressed initial support for this proposal.

Conclusion

Staff is recommending that the Planning Commission and Urban Forestry Commission approve the recommendations outlined at the beginning of this report, including the general recommendations in this memorandum and the more specific recommendations in Attachment A. Moreover, staff wishes to express our sincere thanks and gratitude to both commissions, our partner bureaus, and community stakeholders for the time and effort spent to make this a better proposal.

Staff recognizes that there will be substantial revisions to the draft code amendments, including continued simplification of Title 11, Trees. While the project proposal as outlined in the staff recommendations (Attachment A) has been revised and considerably simplified, the fundamental principles and basic components of the February Proposed Draft will be carried forward into the next draft of the proposal.



ATTACHMENT A

Planning Commission/Urban Forestry Commission

Project Proposal Tracking Table and Staff Recommendations July 14, 2010

This document presents a comprehensive outline of the code sections proposed to be amended through the Citywide Tree Policy and Regulatory Improvement Project. It provides a tool to track recommendations related to the Proposed Draft, issued February 2010. These recommendations reflect direction received from the Planning Commission (PC) and Urban Forestry Commission (UFC), respond to issues raised during public testimony, and additional staff recommendations to maintain overall consistency or address technical issues.

Staff is requesting that the commissions take action in whole or in part to approve, modify, or reject the recommendations outlined in this table in order to guide development of the Recommended Draft for City Council's consideration.

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Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
I. Title 11, Trees	Revise proposed draft Title 11 to clarify and simplify code language.
Introduction Chapter Summary: Establishes the purpose and authority for this title, orients the user to the title organization and structure, describes how these regulations relate to other titles of City code, and what process is used to determine the applicable regulations for particular proposals to plant, prune, or remove a tree.	
How to Use This Document	Approve the concept of an Introductory chapter, with direction to; <ul style="list-style-type: none"> • Add further references to the goals of the urban forest management plan and canopy goals • Delete term “Development Trees” from Table 1 – use “trees in development situations” • Revise Table 2 to make it clear that tree permits are not required in development situations. Tree requirements will be addressed under the required development permit. • Revise to reflect changes made to the remainder of the title
Organization of Title 11	
Determining the Tree Regulations Applicable to a Specific Tree	
Format of Title 11	
11.100 - Administration of This Title Summary: Includes administration roles and responsibilities, provisions for amending the Title, adopting administrative rules, authorizes and clarifies tree fund(s), performance guarantees and fees, enables charitable contributions, and includes legal disclaimers related to severability and liability.	
11.100.010 Short Title	Approve
11.100.020 Authority	Approve
11.100.030 Code Administration and Duties Performed	Approve
11.100.040 Hierarchy of Regulations	Approve
11.100.050 General Rules for Reading and Applying the Code Language	Approve
11.100.060 Amendments to this Code	Approve
11.100.070 Administrative Rules	Approve
11.100.080 Interagency Agreements	Approve
11.100.090 Tree Planting and Preservation Fund	Approve with modification to change method of establishing in-lieu fee from “per inch” to “per tree”.
11.100.100 Urban Forestry Fund	Approve
11.100.110 Charitable Contributions	Approve
11.100.120 Performance Guarantees	Approve with direction to correct filing information to reflect that filing with the City auditor is no longer required.
11.100.130 Fees	Approve
11.100.140 Severability	Approve
11.100.150 Liability	Approve

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
11.200 – Urban Forestry Program Summary: Defines membership provisions and roles for Urban Forestry Commission, and the appeals board. Establishes the Urban Forest Plan requirements (purpose, roles for coordination and plan updates). Also includes the heritage tree program.	
11.200.010 Purpose.	Approve
11.200.020 The Urban Forestry Commission. (Broadens membership to include other NGO's; two 4-year term limit before break in service required; adds BES,BDS and Water as ex officio members, along with PBOT (existing); requires adopting and filing rules of order; expands roles to include consultation on major city projects, input on Title 11 code amendments, advocacy roles for budget matters affecting the urban forest, and explicit reference to heritage tree nomination reviews)	Approve
11.200.030 The Urban Forestry Appeals Board. (Formalizes existing reference to an appeal "subcommittee" and makes this their specific role)	Approve
11.200.040 Technical Assistance. (Carried over from existing language)	Approve
11.200.050 The Urban Forest Plan. (Adapts the Urban Forestry Master Plan to a less project-specific type plan, to a more comprehensive asset management set of documents, including the UF Management Plan and Action Strategy. Also includes requirements for periodic updates)	Approve
11.200.060 Heritage and Historic Trees. (Folds in 6 pre-existing historic and historic landmark trees into the heritage tree program. Prohibits accepting new nominations for nuisance species trees. Changes standard of 'unanimous vote' to 'majority of commissioners' to de-list a heritage tree to be consistent with standard for approving nomination of a heritage tree.)	Approve with modifications: <ul style="list-style-type: none"> • Change heritage tree provisions, including requiring 6 vote majority of full UFC membership for listing and delisting. • Maintain the term "Heritage Trees" and clarify that "Historic Trees" are to be treated as Heritage Trees, • Use consistent terms for tree condition, and require UFC approval to remove except for dead/dangerous/emergency
11.300 – Permit Procedures Summary: This chapter presents the general requirements and procedures that would apply to each of the tree permit types authorized by this title. Review triggers, approval criteria, mitigation, and review authority are detailed in Chapters 11.400 and 11.500. This chapter establishes requirements for permit posting and expiration.	
11.300.010 Purpose	Approve
11.300.020 Overview of Tree Permits (Summary of permit applicability)	Approve with direction to simplify and align with other modifications resulting from discussions.
11.300.030 Application Requirements (Makes requirements for application materials explicit, but allows forester to waive particular requirements when not needed to review the request; clarifies who has authority to submit applications for city/street/private tree requests.)	Approve with modifications: <ul style="list-style-type: none"> • Allow permit application for city trees to be submitted by Bureau managing site. • Clarify that street tree removal permits require adjacent property owner's approval

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
<p>11.300.040 - 060 Tree Permit Procedures - Type A, Type B, Type C (Includes notice, decision, appeals, posting, certifying replacement)</p>	<p>Revise proposed draft to create two permit types:</p> <ol style="list-style-type: none"> 1) <i>Confirmation</i> that tree meets criteria for removal and replacement (e.g. dead, diseased, etc). No site visit necessary when adequate documentation provided, Forestry may continue to inspect all street tree requests. Applicant appeal only. 2) <i>Review</i> request against criteria (for larger trees and multiple trees). Forestry staff would visit site to evaluate request. Decision can be appealed by applicant or public. <p>Revise to add provision for City Forester to waive public appeals process when necessary to provide timely issuance of permits associated with utility repair and maintenance when public health or safety are threatened.</p> <p>Direct staff to develop administrative rules to address permit review timelines, with recognition that timelines are dependent on adequate funding. Administrative rules should also include guidance for the City Forester when applying discretion provided in the code (e.g., determining the appropriate level of mitigation).</p> <p><i>Reflects PC/UFC direction - 6/8/10 and 6/17/10</i></p>
<p>11.300.070 Programmatic Permit Application Requirements and Procedures (Allows public agencies to apply for long term (5 year) permit to conduct routine and customary maintenance activities, e.g., pruning small nuisance tree removal, tree planting on city sites, etc. Heard by City Forester in consultation with UFC – no appeals process)</p>	<p>Revise parameters of programmatic permit as follows:</p> <ul style="list-style-type: none"> • Permits would be limited to routine maintenance and program-related activities (pruning, root cutting, planting) and removal of any size dead, diseased, dangerous trees and nuisance tree species, and other trees less than 6” diameter. The City Forester would retain discretion to limit removal to smaller trees. (A separate permit would be required for removal of other trees) • Approval criteria include “net benefit” to the urban forest • City Forester to include pending Programmatic Permit applications and applicants’ annual reports in Monthly Forestry Report to the UFC • The public could raise issues with pending permit applications or annual reports during comment period at monthly UFC meetings • Applicants could appeal decision to Urban Forestry Appeals Board • City Forester may revoke permit based on failure to meet reporting requirement or non-compliance (not following specifications, limitations on allowed work, or failing to consult UF when required) • Violations subject to same penalties that apply to other “unpermitted” activities <p>Direct staff to evaluate a “Tree Management Permit” option to allow multi-year tree management activities on large private sites, such as open space and institutional uses (e.g., golf courses, college campuses, cemeteries). Identify implementation costs and funding options.</p> <p><i>Reflects PC/UFC direction - 6/8/10 and 6/17/10</i></p>

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
11.400 – City Trees and Street Trees Summary: Chapter 11.400 essentially replaces Chapter 20.40 for permitting pruning, planting and removal of street and other ‘public trees.’ Applies to trees of ‘any size’. Eliminates dual permit approval for tree removal in conjunction with a proposed development. Defines pruning to exclude minor trimming activities. Now prohibits planting Nuisance Trees in streets or on City properties. Adds a public appeal for removal of healthy 20”+ trees. Includes removal criteria and mitigation standards.	
11.400.010 Purpose	Approve with modification to remove “noise buffering” from list of benefits
11.400.020 When These Regulations Apply	Approve with revision to City and Street tree removal using a 3” regulated size for permits
11.400.030 Exemptions (Specifically exempts state/fed, city forester, and refers other situations like heritage trees, trees in development, tree activity as part of programmatic permit to relevant section of code)	Approve with possible modification to consolidate exemptions into Chapter 11.300 (Permit Procedures) to streamline this chapter.
11.400.040 Relationship to Other City Regulations (Cross-reference to other code titles)	Approve with modifications: <ul style="list-style-type: none"> • Consider consolidating this section into Chapter 11.300 (Permit Procedures) to streamline this chapter. • Revise to include restrictions in wellhead protection areas for conformance with the Water Code (Title 21)
11.400.050 Disposition of Wood from City and Street Trees (carries existing language over from T20)	Approve
11.400.060 General City Tree and Street Tree Permit Requirements (overview of permit type applicability)	Revise proposed draft : <ul style="list-style-type: none"> • Change regulated tree size for City and Street trees to ≥ 3” diameter, with caveat that newly planted trees must be maintained and/or replaced until they reach the 3” regulated tree size. <i>Reflects PC/UFC direction - 5/11/10</i>

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation																					
11.400.070 – 090 Tree Permits – Type A, Type B, Type C (criteria for review and approval)	<p>Revise proposed draft for street tree permits to align with revisions to Private Tree permit system:</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr> <th style="text-align: left;">Street Trees</th> <th style="text-align: center;">Mitigation</th> <th style="text-align: center;">Appeal</th> </tr> </thead> <tbody> <tr> <td colspan="3">Confirmation:</td> </tr> <tr> <td>Dead, Diseased, Dangerous</td> <td style="text-align: center;">1:1</td> <td style="text-align: center;">Applicant</td> </tr> <tr> <td colspan="3">Review:</td> </tr> <tr> <td><20" healthy (incl. nuisance species)</td> <td style="text-align: center;">1:1</td> <td style="text-align: center;">Applicant</td> </tr> <tr> <td>≥20" healthy (incl. nuisance species)</td> <td style="text-align: center;">3:1</td> <td style="text-align: center;">Applicant & Public</td> </tr> <tr> <td>≥5 healthy trees per frontage</td> <td colspan="2" style="text-align: center;">Up to inch for inch</td> </tr> </tbody> </table> <p>Revise the criteria for removal of Street Trees to:</p> <ul style="list-style-type: none"> Clarify that the City's general policy is not to allow removal of mature healthy street trees except if not appropriate for the location Consider historic district goals and guidelines or other adopted street or neighborhood tree plans if applicable. Consider a tree's status as a species on the City's Nuisance Plants List, if applicable, along with other factors; Nuisance species could be removed by right in environmental zones. Include discretion for City Forester to adjust mitigation requirements if there is insufficient space for replacement trees. <p>Revise the street tree planting standards to consider character-defining streetscapes and/or Consider historic district goals and guidelines or other adopted street or neighborhood tree plans if applicable, when determining appropriate tree species for planting.</p> <p>Staff does not recommend adding special provisions for Norway maples. Instead, direct staff to identify appropriate replacement species for Norway maples and to address the impact of the City's Invasive Plants Policy on street trees in the next update of the Urban Forest Action Plan.</p> <p><i>Reflects PC/UFC direction - 5/11/10, 6/8/10 and 6/17/10.</i></p>	Street Trees	Mitigation	Appeal	Confirmation:			Dead, Diseased, Dangerous	1:1	Applicant	Review:			<20" healthy (incl. nuisance species)	1:1	Applicant	≥20" healthy (incl. nuisance species)	3:1	Applicant & Public	≥5 healthy trees per frontage	Up to inch for inch	
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Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation																				
11.400.070 – 090 Tree Permits – Type A, Type B, Type C (continued) (criteria for review and approval)	Revise proposed draft for City Tree permits to align with revisions to Private Tree permit system as follows: : <table border="1" style="margin: 10px auto; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="padding: 2px;"><i>City Trees</i></th> <th style="padding: 2px;">Mitigation</th> <th style="padding: 2px;">Appeal</th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">Confirmation:</td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;">Dead, Diseased, Dangerous Nuisance species</td> <td style="padding: 2px;">1:1</td> <td style="padding: 2px;">Applicant</td> </tr> <tr> <td style="padding: 2px;">Review:</td> <td></td> <td></td> </tr> <tr> <td style="padding: 2px;"><20" healthy</td> <td style="padding: 2px;">1:1</td> <td style="padding: 2px;">Applicant</td> </tr> <tr> <td style="padding: 2px;">≥20" healthy</td> <td style="padding: 2px;">3:1</td> <td rowspan="2" style="padding: 2px;">Applicant & Public</td> </tr> <tr> <td style="padding: 2px;">≥5 healthy trees per site</td> <td style="padding: 2px;">Up to inch for inch</td> </tr> </tbody> </table> <ul style="list-style-type: none"> Include discretion for City Forester to adjust mitigation requirements if there is insufficient space for replacement trees. 	<i>City Trees</i>	Mitigation	Appeal	Confirmation:			Dead, Diseased, Dangerous Nuisance species	1:1	Applicant	Review:			<20" healthy	1:1	Applicant	≥20" healthy	3:1	Applicant & Public	≥5 healthy trees per site	Up to inch for inch
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11.500 – Private Trees Summary: Chapter 11.500 essentially replaces Chapter 20.42 for permitting removal of 'private trees.' Applies to trees ≥6" in resource areas and all other ≥12" trees. Eliminates the exemption for "developed, not dividable, single family zoned lots" Emphasizes preserving priority trees (20"+), requires some replacement of trees in all cases (including dead, dangerous, and nuisance trees). Standardizes mitigation requirements. Adds new pruning permit in resource areas to avoid environmental review.																					
11.500.010 Purpose	Approve with modification to remove "noise buffering" from list of benefits																				
11.500.020 When These Regulations Apply	Approve																				
11.500.030 Exemptions (Specifically exempts container trees, trees on sites subject to federal, state, court order, trees grown for agricultural use, i.e. timber harvest and nurseries. Also exempts forester and refers other situations like heritage trees, trees in development, tree activity as part of programmatic permit to relevant section of code)	Approve with added clarification that nurseries are included in exemption. Also, possible modification to consolidate exemptions into Chapter 11.300 to streamline this chapter.																				
11.500.040 Relationship to Other City Regulations (cross reference to other code titles)	Approve with possible modification to consolidate relationship to other regulations into Chapter 11.300 to streamline this chapter. Include modifications to reflect restrictions in wellhead protection areas for conformance with the Water Code (Title 21).																				
11.500.050 Disposition of Wood from Private Trees (Mirrors section in city/street tree chapter, but notes requirements to leave wood in e-zones and clarifies that wood must be properly stored)	Approve with modification to include reference to the habitat values of tree snags and other woody debris along with considerations for fire safety and pests.																				

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation																						
<p>11.500.060 - 090 General Private Tree Permit Requirements (Type A, Type B, Type C) (Overview of permit types and applicability, criteria for review and approval. Includes pruning permit in “resource areas.”)</p>	<p>PRIVATE PRUNING PERMIT (applies to specified resource areas only) Revise to ensure current pruning exemptions in e-zone regulations (33.430) are carried over to Title 11 private tree pruning exemptions. Clarify that pruning permits are required only in specified resource areas.</p> <p>PRIVATE TREE REMOVAL PERMIT Revise as follows:</p> <ul style="list-style-type: none"> • Establish two permit types (confirmation and review) for properties currently regulated (multi-dwelling, commercial, industrial and vacant and/or dividable single-family) • Create a homeowner system that: <ul style="list-style-type: none"> - Provides a registration process for trees <20” to ensure that other conditions do not apply to tree removal (LU condition, e-zone, plan district, etc) – no fee, no permit, no appeals, replacement encouraged, but not required. - Requires a simple permit for trees ≥20”. No fee, only applicant may appeal, tree-for-tree replacement required. • Include discretion for City Forester to adjust mitigation requirements if there is insufficient space for replacement trees. • Eliminate 6” size threshold for trees (oak and madrone) outside of resource area. <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th colspan="3" style="text-align: center;">Standard System</th> </tr> <tr> <th style="width: 60%;"></th> <th style="width: 20%; text-align: center;">Mitigation</th> <th style="width: 20%; text-align: center;">Appeal</th> </tr> </thead> <tbody> <tr> <td colspan="3">Confirmation:</td> </tr> <tr> <td style="font-size: small;">Dead, Diseased, Dangerous, w/in 10’ of bldg.</td> <td rowspan="3" style="text-align: center; vertical-align: middle;">1:1</td> <td rowspan="3" style="text-align: center; vertical-align: middle;">Applicant</td> </tr> <tr> <td style="font-size: small;">Nuisance Species</td> </tr> <tr> <td style="font-size: small;">4 trees 12-20”/year</td> </tr> <tr> <td colspan="3">Review:</td> </tr> <tr> <td style="font-size: small;">≥20” healthy</td> <td style="text-align: center;">3:1</td> <td rowspan="2" style="text-align: center; vertical-align: middle;">Applicant & Public</td> </tr> <tr> <td style="font-size: small;">≥5 healthy trees per site</td> <td style="text-align: center;">up to inch:inch</td> </tr> </tbody> </table> <p style="font-size: small; margin-top: 5px;"><i>Reflects PC/UFC direction - - 5/11/10, 6/8/10 and 6/17/10</i></p>	Standard System				Mitigation	Appeal	Confirmation:			Dead, Diseased, Dangerous, w/in 10’ of bldg.	1:1	Applicant	Nuisance Species	4 trees 12-20”/year	Review:			≥20” healthy	3:1	Applicant & Public	≥5 healthy trees per site	up to inch:inch
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Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation			
11.500.060 - 090 General Private Tree Permit Requirements (continued)	<p>PRIVATE TREE REMOVAL PERMIT (continued)</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th style="text-align: center;">Homeowner System*</th> </tr> </thead> <tbody> <tr> <td> <p>"Call before you cut" To remove a tree <20" diameter, call 503-823-_____ or go online www._____ :</p> <p><u>The City will:</u></p> <ol style="list-style-type: none"> 1. Record in TRACS 2. Check for eligibility, conditions or other regs 3. Send "all clear" form or refer to correct process 4. Send tree planting/promo info, coupons, etc. <p><i>No tree replacement required</i></p> </td> </tr> <tr> <td> <p>"Cut a tree – plant a tree" To remove a tree ≥20" diameter (or ≥6" in resource areas**): <i>Replace each tree with 1 tree</i> (Applicant may appeal)</p> </td> </tr> </tbody> </table> <p>*Applies to non-vacant, built-out single family lots – to be defined based on lot size and zoning designation (e.g. R5 lot, less than 9,500 sf, developed with a house). Corner lots that do not exceed the size threshold for the zone, will be considered "built-out". Include single-family uses on lots <3000 sf in other zones. ** Environmental and PV natural resource zones, Scenic Overlay, Johnson Creek, Rocky Butte Plan Districts, etc.</p>	Homeowner System*	<p>"Call before you cut" To remove a tree <20" diameter, call 503-823-_____ or go online www._____ :</p> <p><u>The City will:</u></p> <ol style="list-style-type: none"> 1. Record in TRACS 2. Check for eligibility, conditions or other regs 3. Send "all clear" form or refer to correct process 4. Send tree planting/promo info, coupons, etc. <p><i>No tree replacement required</i></p>	<p>"Cut a tree – plant a tree" To remove a tree ≥20" diameter (or ≥6" in resource areas**): <i>Replace each tree with 1 tree</i> (Applicant may appeal)</p>
Homeowner System*				
<p>"Call before you cut" To remove a tree <20" diameter, call 503-823-_____ or go online www._____ :</p> <p><u>The City will:</u></p> <ol style="list-style-type: none"> 1. Record in TRACS 2. Check for eligibility, conditions or other regs 3. Send "all clear" form or refer to correct process 4. Send tree planting/promo info, coupons, etc. <p><i>No tree replacement required</i></p>				
<p>"Cut a tree – plant a tree" To remove a tree ≥20" diameter (or ≥6" in resource areas**): <i>Replace each tree with 1 tree</i> (Applicant may appeal)</p>				
<p>11.600 – Trees in Development Situations Summary: Addresses the preservation, protection, and planting of trees through the development process. Adds tree preservation requirements to building permits, as well as a baseline tree density standard. Also includes tree protections for property line and nearby trees. Preservation standards vary by lot size. Density standards vary by size and development type and can be met by combination of preserving, planting or paying for trees.</p>				
11.600.010 Purpose	Approve with modification to remove "noise buffering" from list of benefits			
11.600.020 When These Regulations Apply	Approve with modification to add 10% project value cap on street tree improvements (similar to non-conforming upgrades for on-site improvements).			
11.600.030 Exemptions Exempts certain trees (dead, diseased, dangerous, and nuisance) from preservation. Excludes Heritage Trees from these standards (subject to other requirements). Exempts certain activities (authorized by a programmatic permit, or emergency tree removal or pruning). Clarifies that prior approvals for preservation take precedence.	Approve			
11.600.040 Relationship to Other City Titles	Approve with possible modification to consolidate relationship to other regulations into Chapter 11.300 to streamline this chapter. Include modifications to reflect restrictions in wellhead protection areas for conformance with Water Code (Title 21)			

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
<p>11.600.050 Tree Plan Submittal Requirements Includes details of what needs to be shown on development application plans.</p>	<p>Revise submittal requirements to reflect direction regarding trees on adjacent sites and property lines and add clarity:</p> <ul style="list-style-type: none"> • Delete the requirement to identify trees on adjacent sites. Identification of trees located on property lines as well as trees adjacent to work within the right of way will continue to be required. • Clarify requirement to indicate trees that are proposed to be removed by adding “and those to be retained voluntarily.” Trees retained voluntarily (without approved protection) may not be used to meet tree preservation or density standards. • Clarify that a tree plan is required only when tree preservation or tree density requirements apply • Clarify that tree plans must include an inventory of tree location and size. A tree survey is not required (Title 33 will continue to require tree surveys for some types of land use reviews). <p><i>Reflects PC/UFC direction - 4/27/10</i></p>
<p>11.600.060 Tree Preservation Standards Requires preservation of a certain number of trees on site OR mitigation (plant or pay) when those trees are not preserved. Applies to private/public development and trees in rights of way.</p>	<p>Revise tree preservation requirements for Private Trees Retain a preservation standard/incentive along with proposed Tree Density requirements, with modifications:</p> <ul style="list-style-type: none"> • Shift to a 12” diameter tree size threshold (vs. 20” in 2/10 proposal), and a 35% preservation standard (vs. 50% in 2/10 proposal) • Exempt lots ≤ 3,000 from the preservation standard • Exempt proposals involving ≥ 90% building coverage from the preservation standard • Exempt proposals for additions on single family lots (to match homeowner system) • Tree density standards apply on sites exempt from preservation standards. • If preservation standard is not met, a payment into the Tree Fund is required for offsite mitigation (cost of planting and establishing two trees) • Clarify that preservation standards apply only when site disturbance activities are proposed. • Add incentive to preserve native trees by allowing smaller native trees (≥ 6”) to count toward the preservation standard. This option would be available (not required) to applicants that provide documentation of tree species and size. <p>Direct staff to evaluate the need for a minimum timeframe for retention of trees preserved during the building permit process.</p> <p><i>Reflects PC/UFC direction - 4/27/10 and 5/11/10</i></p>

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
11.600.060 Tree Preservation Standards (continued)	<p>Approve requirements for City and Street Trees with modifications:</p> <ul style="list-style-type: none"> • Add requirement for 1:1 tree replacement to apply when partially and unimproved streets are improved (newly planted street trees count toward replacement requirements) • Provide the City Forester discretion to reduce mitigation where the above replacement requirement is disproportionate to the impact of tree removal • Revise replacement ratios and requirements for City Tree preservation standards to be more consistent with private tree requirements <p><i>Reflects PC/UFC direction - 4/27/10 and 5/11/10</i></p>
<p>11.600.070 Tree Density Standards</p> <p>Establishes minimum tree planting requirements based on site area. Allows credits for trees preserved. Also allows for payments in lieu of planting.</p>	<p>Approve proposal to establish Tree Density Standards for all development types with preserve, plant or pay options. Revise standards as follows:</p> <ul style="list-style-type: none"> • Replace “tree unit” with requirements for “small, medium and large” canopy tree types (promotes large canopy trees; consistent with other landscape standards). • Apply to all development types for new construction, additions >200 s.f., and alterations that trigger non-conforming upgrades. • Staff will continue refining tree planting ratios - vary by development type as appropriate. Staff will revisit and evaluate standards that would apply to industrial and employment uses to ensure they are reasonable. • Remove proposed allowance for small lots to count street trees toward tree density. • Clarify ability to define a development impact area on sites ≥1 acre for purposes of calculating tree density (except for non-conforming upgrades) <p><i>Reflects PC/UFC direction - 4/27/10 and 5/11/10</i></p>
<p>11.600.080 Tree Protection Standards</p> <p>Requires protection of trees on site and on property lines. Includes two methods for tree protection: prescriptive path (numeric standard, less flexible) and performance path (prepared by an arborist, site and tree specific). Includes process for changing approved tree protection measures during the course of development. Specifies requirements for tree protection inspections as follows: 1) required initial inspection, prior to ground disturbance; 2) optional interim inspection; 3) required final inspection; and 4) optional post project completion inspection.</p>	<p>Revise proposed draft to remove requirement to protect off-site trees and trees on property lines in the building permit context:</p> <ul style="list-style-type: none"> • Require protection for trees on property lines only if they are to count toward meeting preservation standards. Protection would not be required for trees voluntarily retained. • Address protection of trees on adjacent sites through the land division process and public projects. Encourage but do not require such protection in other land use reviews or the building permit process. • Develop provisions allowing minor encroachment into root protection zones and incorporate into tree protection standards. • Develop educational material for developers re: optional BMPs to prevent harm to trees voluntarily retained on-site, and to help prevent impacts on off-site trees. <p>Revise proposed draft to remove specific inspection requirements from the code, with the intent of relying on a spot check system until sufficient funding is available to support a more robust inspection system.</p> <p><i>Reflects PC/UFC direction - 4/27/10 and 5/11/10</i></p>

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
11.600.090 Optional Tree Standards Review Allows applicants who may have overly burdensome mitigation requirements to custom tailor the mitigation plan for the site and proposal with other types of mitigation measures or more reasonable tree planting scenarios.	Delete from proposal. Due to revisions to tree preservation standards (11.600.060), this optional review is no longer necessary. <i>Reflects PC/UFC direction - 5/11/10.</i>
11.700 – Enforcement	
Summary: emphasizes restorative actions before punitive measures, but includes escalating system of penalties depending on nature of infraction. Establishes roles of City Forester (absent development) and BDS (in conjunction with development, and in resource areas). Chapter includes maintenance requirements largely imported from other titles, includes prohibited actions (including planting nuisance trees in specific areas, and topping). Describes inspections and validates certain forms of evidence. Includes enforcement and nuisance abatement process largely adapted from T29. Includes menu of available remedies, types of enforcement actions and additional actions for City, street, and development situations.	
11.700.010 Purpose	Approve
11.700.020 Violations	Approve
11.700.030 Enforcement Authority	Approve
11.700.040 Maintenance Requirements and Responsibilities	Approve
11.700.050 Prohibited Actions	Approve with modification to topping prohibition recognizing Airport FAA restrictions. Would explicitly allow topping for trees that project above, or will upon maturity project above, the height limit delineated by the h-overlay zone
11.700.060 Inspections and Evidence	Approve
11.700.070 Notice and Order	Approve
11.700.080 Correcting Violations of this Title	Approve
11.700.090 Enforcement Actions	Approve
11.700.100 Nuisance Abatement	Approve
11.700.110 Administrative Review	Approve
11.700.120 Appeals to the Code Hearings Officer	Approve
11.700.130 Further Appeals	Approve
11.700.140 Waivers	Approve
11.800 – General Terms	
Summary: Includes a number of new terms and clarifications and updates to existing terms	
11.800.010 Use of Terms	Approve
11.800.020 Definitions Incorporates ANSI standards, defines tree injury, defines pruning to exclude removal of sucker growth and branches up to ¼ inch, defines dangerous, diseased tree, grove tree, non-native non-nuisance tree, defines by illustration the watershed boundaries.	Approve with modifications : <ul style="list-style-type: none"> • Delete definitions that are not used in regulations (e.g. vertical mulching, soil fracturing, tree unit). • Revise term “resource area” and modify throughout title (may cause confusion due to use in Title 33 e-zone regulations). • Revise definition of “tree grove” to incorporate smaller native trees and understory. • Add definition for “development”. • Modify other definitions as necessary for consistency with code refinements.
11.800.030 Measurements (describes method to determine tree size)	Approve

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
11.800.040 Referenced Regulations	Approve
II. Title 33 – Planning and Zoning	
Base Zones (100 series)	
Purpose statement amendments addressing tree function or urban forest <ul style="list-style-type: none"> • Purpose of OS zone 33.100.010 • Purpose of landscaped area in MD, C, E & I zones (33.120.235, 130.225, 140.225) 	Approve
Cross-references in all base zones to Title 11 for demolitions and tree standards (includes on-site trees and street trees)	Approve
Flexible Development Options when priority trees are preserved: <ul style="list-style-type: none"> • Flexible location of required outdoor area in single dwelling zones (33.110.235) • Pedestrian connection standards in MD, C, E & I zones – allowance to increase straight line distance up to 150% (current code allows 120%) (33.120.255, 130.240, 140.240) • Minimum density reduction in MD zones for tree preservation (33.110.205) • Amenity bonus option for increased density in MD zones (33.120.265) 	Approve with modifications: <ul style="list-style-type: none"> • Increase allowance for pedestrian standard to vary up to 200% of straight line distance. • Revise to allow use of flexible development standards when a tree 12” and greater will be preserved, as opposed to “priority tree” (20”+), consistent with the 12” tree size threshold for proposed Tee Preservation Standards (11.600.060).
Additional Use and Development Regulations (200 series)	
33.248, Landscaping and Screening <ul style="list-style-type: none"> • Size of trees at planting for single-dwelling – reduced from 1.5” to 1” caliper (33.248.030) • References to Title 11 for enforcement of topping violations, tree plan requirements, tree protection and street tree requirements • 	Approve
33.248.020, Landscaping and Screening Standards that shift to “tree units”	Delete amendments that reference “tree units” in the landscaping standards (continue use of “small, medium and large” canopy tree terms).
33.258, Nonconforming Development – grouping of landscaping related items and adding tree density standards	Approve
Parking reduction for preservation of priority trees (33.266.110)	Approve with modification to allow use of flexible development standards when a tree 12” and greater will be preserved, as opposed to “priority tree” (20”+), consistent with the 12” tree size threshold for the proposed tree preservation standards (11.600.060)

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
Overlay Zones (400 series)	
<p>33.430, Environmental Overlay Zones</p> <ul style="list-style-type: none"> References to Title 11 – applies when tree removal activities are exempt from e-zone chapter and tree plan requirements for permits Exemption for vegetation removal activities (in non-development situation) – includes explicit requirement for erosion control, non-native non-nuisance trees, and trees within 10' of an existing building or attached structure (33.430.080.C.7) Exemption for pruning conducted under Title 11 permit (33.430.080.C.8) Planting standards made consistent at one-half inch trees and 1 gallon shrubs throughout Tree removal and replacement standards apply to transition areas (33.430.140) Replacement standards added for non-native non-nuisance trees - ratio based on size of tree removed, per table; 1 to 1 replacement added for nuisance trees (throughout standards, except for resource enhancements and right-of-way improvements) 	<p>Approve proposal to:</p> <ul style="list-style-type: none"> Apply e-zone tree removal and replacement standards in transition areas. Establish provisions to address non-native, non-nuisance trees. <p>Revise Standards for Utility Lines, Resource Enhancements, Outfalls & Public Recreational Facilities (33.430.150, 33.430.170, 33.430.180 & 33.430.190) to increase the size of native trees that can be removed and replaced from 10" to 12" diameter (for consistency with other regulations).</p> <p>Revise requirements for native vegetation to allow street trees to be non-native trees, when directed by the City Forester. Direct staff to develop written guidelines for when non-native street trees would be allowed. Planting of species on the Nuisance Plants List would continue to be prohibited.</p> <p><i>Reflects PC/UFC direction - 4/27/10</i></p>
<p>33.440, Greenway Overlay</p> <ul style="list-style-type: none"> Add tree removal to activities within greenway setback that are subject to greenway review unless exempt (33.440.210) Add exemption from Greenway Review for removal of trees not located in greenway setback or within the river natural 'n' or river water quality 'q' overlays (33.440.320.M) Add references to Title 11 - permit requirement for tree removal activities that are exempt from greenway review and tree protection standards 	<p>Approve with direction to incorporate minor amendments to 33.440 included in River Plan package.</p>
<p>33.465, Pleasant Valley (mirrors e-zone changes where applicable)</p>	<p>Approve with modifications consistent with environmental zone revisions where relevant.</p>
<p>33.480 Scenic Overlay – Scenic Corridor Standards</p> <ul style="list-style-type: none"> Clarification of tree removal allowances in the following areas: applies to trees within 10 feet of existing or proposed building and attached structures, within 5 feet of a proposed driveway, installation of utilities within a 10 foot wide corridor, trees in close proximity to RF facilities and nuisance species. (33.480.040.B.2.g) Reference to Title 11 permit requirement – applies to allowed tree removal when no development is proposed (33.480.040.B.2.h) 	<p>Approve</p>
Plan Districts (500 series)	
<p>33.508 CS/PIC Plan District – Environmental Zones</p> <ul style="list-style-type: none"> Add references to Title 10 Erosion Control and Title 11 Trees – apply to exempt activities including allowed tree removal (33.508.314) Add exemption for pruning conducted under Title 11 permit (33.508.314.N) 	<p>Approve, with modification to add exemption for tree removal within 10 feet of an existing building or attached structure (consistent with the proposed exemptions in 33.430).</p>

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
<p>33.515 Columbia South Shore Plan District</p> <ul style="list-style-type: none"> • Add references to Title 10 Erosion Control and Title 11 Trees - apply to exempt activities including allowed tree removal (33.515.274) • Add exemption for pruning conducted under Title 11 permit (33.515.274.N) 	<p>Approve, with modification to add exemption for tree removal within 10 feet of an existing building or attached structure (consistent with the proposed exemptions in 33.430).</p>
<p>33.537 Johnson Creek Basin Plan District</p> <ul style="list-style-type: none"> • Delete exemption from e-zone regulations for removing trees within Johnson Creek below the ordinary high water level (33.537.040) • Consolidate and clarify tree removal allowances: applies to trees within 10 feet of existing or proposed building and attached structures, within 5 feet of a proposed driveway or right-of-way improvement, installation of utilities within a 10 foot wide corridor and nuisance species. (33.537.125) • New allowance to remove trees within 15 feet of a proposed roadway or City required construction easement (33.537.125.C.5) • New allowance to remove trees between 6 and 12 inches, subject to replacement requirements (33.537.125.C.6) • New reference to Tree Review if standards aren't met and statement that if both environmental review and tree review are triggered by a proposal, only environmental review is required (33.537.125.C.6) • Reference to Title 11 permit requirement – applies to allowed tree removal when no development is proposed (33.537.125.D) 	<p>Approve</p>
<p>33.570 Rocky Butte Plan District</p> <ul style="list-style-type: none"> • Clarification of tree removal allowances in the following areas: applies to trees within 10 feet of existing or proposed building and attached structures, within 5 feet of a proposed driveway, installation of utilities within a 10 foot wide corridor and nuisance species. (33.570.040.C) • New allowance to remove trees between 6 and 12 inches, subject to replacement requirements (33.570.040.C.6) • Reference to Title 11 permit requirement – applies to allowed tree removal when no development is proposed (33.570.040.D) 	<p>Approve</p>
<p>33.580 South Auditorium Plan District</p> <ul style="list-style-type: none"> • Add 6" size threshold for triggering Design Review for tree removal • Amendments to approval criteria to allow additional reasons for tree removal to be considered and additional flexibility in determining the planting location of replacement trees (33.580.130.A) • Allowance for removal of dead, diseased or dangerous trees without design review (33.580.130.B) 	<p>Approve</p>

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
Land Divisions (600 series)	
<p>33.630 Trees</p> <ul style="list-style-type: none"> • Changes to purpose statement emphasizing the opportunity to integrate trees early in site design in land divisions, the importance of making space for tree planting, preserving high value trees, and incorporating additional benefits (such as providing food, capturing carbon, and value of native species) (33.630.010) • Add exemption for Central City Plan District (33.630.020) • Reference to Tree Plan submittal requirements (33.630.100) • Include trees partially on site (trees on property line trees) in those subject to regulations (33.630.200) • Add exception to tree preservation requirements for developed C, E & I zoned sites – allowance to defer tree preservation review until future development (33.630.200.A.2) • Add exception to tree preservation requirements for sites partially in e-zone and undergoing concurrent environmental and land division review – only tree preservation criteria applied; no standards (33.630.200.A.3) • Delete significant tree table (18 native species at various sizes) and use of term in chapter. Replace with “priority tree” – 20”+ trees and 6”+ native oak and madrone. • Revise preservation standards to add focus on priority trees and groves, and note locations where trees may be preserved (33.630.200.C) • New tree preservation criteria that guide priorities for preservation (trees with greatest benefit and long-term viability), consider the intended use and intensity of development and site constraints, and guide mitigation where appropriate (33.630.200.D) • Delete Tree Preservation Methods section (33.630.200, current code), including the requirement for tree preservation tract boundaries to extend 5 feet beyond the root protection zone of trees preserved. Other requirements deleted are addressed through references to other code sections • Delete mitigation option criteria (33.630.300, current code) – concepts incorporated into new criteria • Revise minimum density modification section to refer to new allowance in multi-dwelling zones, increase maximum allowed reduction from 3 to 4 lots, delete requirement that trees preserved be placed in a tract, and add requirement that single-dwelling lots not be further dividable (33.630.300.B) • New criterion requiring adequate space be provided on proposed lots for required tree planting (33.630.400) • Change to tree preservation credit section clarifying that trees preserved in a tree preservation tract may count toward density, provided at least one trees is planted on single-dwelling lots (33.630.500) • New requirement to consider preservation of trees in right-of-way and street tree planting during preliminary plan review (33.630.600) • New requirement to record tree plans with the final plat (33.630.700) 	<p>Approve with modification:</p> <ul style="list-style-type: none"> • Priority tree term would relate only to trees 20” and larger in diameter trees (delete reference to 6” oak and madrone – to be part of broader considerations of all native species). <p>Direct staff to explore options to:</p> <ul style="list-style-type: none"> • Add emphasis on native trees in the preservation criteria • Add information to administrative rule (e.g., Portland Plant List) or the tree manual regarding the size at which various native trees are important and should be retained. <p><i>Reflects PC/UFC direction - 4/27/10</i></p>

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
33.635 Clearing and Grading <ul style="list-style-type: none"> Add criterion that requires consistency with the Tree Plan (33.635.100.F) 	Approve
33.654 Rights-of-Way <ul style="list-style-type: none"> Add the location of priority trees and groves, streams, floodplain and wetlands to the list of characteristics considered in determining the appropriate location of through streets (33.654.110.B) New criterion that requires the design of new streets to provide space for street trees to the extent practicable (33.654.120.H) Add requirement to show anticipated utility easements for telephone, cable, gas, etc with goal of avoiding conflicts with other services and tree preservation (33.654.130.A) Add consideration of site characteristics when determining the location of future street extensions, including terrain, existing dwellings, e-zoning, water bodies, floodplain and priority trees and groves (33.654.130.C) 	Approve
33.660, Review of Land Divisions in Open Space and Residential Zones 33.662, Review of Land Divisions in C, E & I Zones <ul style="list-style-type: none"> Standardize procedure to modify tree preservation plans after preliminary approval – always processed as Tree Review (33.660.310.A, 33.662.310.A) 	Approve
33.663 Final Plats <ul style="list-style-type: none"> Add reference to required tree plan recording to Legal Documents section (33.663.200.F) Delete section on Changes to Final Plat Before Recording (33.630.310 in current code) – repeats other sections Clarify section on Changes to Final Plat After Recording is addressing changes to the final plat survey (33.663.310) 	Approve
33.664, Review of Land Divisions on Large Sites in Industrial Zones <ul style="list-style-type: none"> Add reference to required tree plan recording to Legal Documents section (33.664.220.G) 	Approve
33.665 Planned Development Review <ul style="list-style-type: none"> Add criterion in clearing and grading section consistent with 33.635 (33.665.340.E) 	Approve
Administration and Enforcement (700 series)	
Expiration of Tree Preservation Requirements (33.700.115) <ul style="list-style-type: none"> Tree preservation conditions expire 10 years after final plat recording for land division cases or 10 years after land use approval for other case types. 	Approve establishment of an expiration date for tree preservation plans. Direct staff to continue evaluating and potentially refining the timeframe. <i>Reflects PC/UFC direction - 4/27/10</i>
Preliminary Tree Assessment for Type III land divisions (33.730.050) – occurs with required pre-application conference	Delete code requirement for Early Tree Assessment. Staff to explore an optional assessment and/or operational changes to meet early identification goals. <i>Reflects PC/UFC direction - 4/27/10</i>

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
Application Requirements (33.730.060) – Tree Plan submittal requirements	Revise for consistency with direction on land use cases (CU, DZ and AD cases 33.805, 815 & 825) and protection of trees on adjacent sites/property lines (11.600.080). Staff to evaluate whether separate Tree Plan submittal requirements for reviews other than land divisions are necessary given changes to the proposal.
Requests for Changes to Conditions of Approval (33.730.140) – Allows changes to tree preservation conditions to be processed through Tree Review. This provision is included primarily to address reviews other than land divisions (CU, DZ, AD).	Revise for consistency with direction on land use cases (CU, DZ and AD cases 33.805, 815 & 825). Staff to evaluate whether this provision is necessary given changes to the proposal.
Land Use Reviews (800 series)	
Adjustments (33.805) <ul style="list-style-type: none"> Add criterion addressing impacts to priority trees, tree groves, wetlands and water bodies outside of environmental zones (33.805.040) 	Delete proposed criterion from Adjustment review. <i>Reflects PC/UFC direction - 4/27/10</i>
Conditional Uses (33.815) <ul style="list-style-type: none"> Add criterion addressing preservation of priority trees and tree groves and determining mitigation if Title 11 tree preservation standards are not met. Applies to Uses in Open Spaces Zones, Institutional and Other Uses in R Zones, Public Safety Facilities, & Radio Frequency Transmission Facilities 	Revise proposal: <ul style="list-style-type: none"> Include tree preservation in the list of factors considered when evaluating "Character and Impacts" or "Physical Compatibility" for uses in OS and R zones (33.815.100 & 105). Delete proposed criterion. Delete proposed criterion from Public Safety Facilities (33.815.223) Revise proposed criterion for Radio Frequency Transmission Facilities (33.815.225) to state that impacts on priority trees and groves must be minimized (rather than no removal). <i>Reflects PC/UFC direction - 5/11/10</i>
Conditional Use Master Plans (33.820) Add requirement to provide a tree plan. Includes option to provide a conceptual tree plan with more detailed tree plan provided in subsequent reviews or a Master Tree Plan that establishes standards for preservation and mitigation, along with a conceptual plan.	Revise proposal for consistency with direction on conditional uses (Chapter 33.815). Delete requirement to provide a Tree Plan (33.823.070.I). (Proposed changes to land use submittal requirements in 33.730 are adequate to obtain necessary tree information.)
Design Review (33.825) Add criterion addressing preservation of priority trees and tree groves and determining mitigation if Title 11 tree preservation standards are not met.	Revise proposal: <ul style="list-style-type: none"> Delete proposed tree preservation approval criterion, but retain "tree preservation" in list of Factors Reviewed During Design Review (33.825.035) <i>Reflects PC/UFC direction - 5/11/10</i>

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
<p>Tree Review (33.853)</p> <ul style="list-style-type: none"> • Review requires for tree removal not meeting standards in Scenic overlay, Rocky Butte PD and Johnson Creek PD: <ul style="list-style-type: none"> - Add review for requests to vary from Johnson Creek PD (currently applies for similar situations in Scenic and Rocky Butte). (33.853.020) - Add criteria to allow tree removal when necessary for reasonable development of the site (33.853.040.A) • Amend procedures: all Tree Reviews are processed as a Type II review, with the exception of some violations. Type III violation review is triggered for removal of more than two priority trees or more than two trees within a tree grove (current threshold is more than 12" inches) AND when the original review was a Type III. (33.853.030) 	<p>Approve</p>
<p>Tree Review – Corrections to violations (33.853.040.C)</p> <ul style="list-style-type: none"> • Add requirement to submit an arborist assessment if other trees will be preserved as mitigation for violation • Add additional flexibility for methods of mitigation, including an allowance to pay into the Tree Fund in lieu of planting and an allowance to plant smaller caliper trees when appropriate. 	<p>Approve with direction to explore expansion of pay in lieu option to include non-profit organizations that plant trees.</p>
<p>Tree Review (33.853)</p> <p>Add references to reviews other than land divisions, including criteria for changing tree preservation requirements and violations of land use conditions.</p>	<p>Revise for consistency with direction on land use cases (CU and DZ cases 33.815 & 825). Staff to evaluate whether this provision is necessary given changes to the proposal.</p>
General Terms (900 series)	
<p>Definitions (33.910)</p> <ul style="list-style-type: none"> • New definitions for: development impact area, non-native non-nuisance tree, pruning, topping, tree grove, tree unit, dangerous tree, dead tree, diseased tree, heritage tree and priority tree • Definition for "Identified wetlands, identified streams, identified water bodies" is amended to include resources identified in the adopted resource inventory OR maps. This change clarifies that the resource need only be identified in one way, not both to trigger protection requirements in the environmental zone regulations. 	<p>Approve proposal to change "identified streams/wetlands/ water bodies" definition.</p> <p>Approve other definitions with direction to revise as needed to be consistent with Title 11 and other changes to the proposal. Specifically, review definition of pruning for consistency with Title 11, and modify grove as noted above and delete reference to tree unit.</p> <p><i>Reflects PC/UFC direction - 4/27/10</i></p>
<p>Measurements (33.930)</p>	<p>Approve with direction to revise measurements as needed for consistency with Title 11 and other changes to the draft proposal. Specifically, delete description of rounding rules for tree units in 33.930.020, Fractions.</p>

Citywide Tree Project Tracking Table and Staff Recommendations – Planning Commission/Urban Forestry Commission

Code Reference, Summary of Changes in Proposed Draft (Feb. 2010)	Recommendation
III. Other Titles	
Title 3 Administration	
Summary: adds reference to tree permit requirement, deletes solar friendly trees provision as part of previous repeal of the solar permit rules. Adds Title 11 administrative duties for BDS.	Approve
Title 8 Health and Sanitation	
Summary: adds reference to tree permit requirement and environmental zone requirements as part of mosquito control activities which may impact trees.	Approve
Title 14C Public Order and Police	
Summary: Carries existing provisions authorizing police to intercede in enforcement of tree violations from Title 20 to Title 11. Note: primary enforcement is to be done by UF/BDS	Approve
Title 16 Vehicles and Traffic	
Summary: Adds reference to tree permits for visibility clearance activities, clarifies that any trees obstructing visibility in the right of way (either street tree or private tree) must be kept maintained.	Approve
Title 17 Public Improvements	
Summary: Adds reference to tree permit requirement, replacement requirements for street trees when moving buildings, moves tree maintenance requirements to Title 11 (11.700.040)	Approve with modification to 17.52.005 to correct T11 reference or potentially delete chapter 17.52 entirely.
Title 20 Parks and Recreation	
Summary: Correct references to T11 from T20, moves provisions from Chapters 20.40 and 20.42 to Title 11	Approve
Title 24 Building Regulations	
Summary: Deletes requirement for separate tree cutting permit from T24 clearing and grading, deferring instead to Title 11. Adds plan submittal requirement to show trees on adjacent sites or rights of way within 15 feet that may be affected. Requires design of access roads to avoid tree root protection zones as practicable, and replacement or payment for tree planting when trees cannot be located between access roads and buildings.	Approve with modifications to site plan submittal requirements for consistency with direction on protecting trees on property lines and adjacent sites during construction (see 11.600.080)
Title 29 Property Maintenance Regulations	
Summary: Adds references to tree permit requirements when removing trees or pruning street trees as part of nuisance abatement, includes reference to elmwood disposal.	Approve
Title 31 Fire Regulations	
Summary: Add consideration of tree preservation in siting criteria for fire access roads	Approve
Dutch Elm Disease Ordinance	
Summary: Repeal ordinance with adoption of T11 (11.700.040.C)	Approve

Citywide Tree Policy Review and Regulatory Improvement Project Update

OUTREACH CALENDAR, INCLUDES THE FOLLOWING ACTIVITIES TO DATE:

Briefing Calendar

Project Briefing/Review	Date	# of public participants
2007		
Urban Forestry Commission (UFC)	October 18 th , 7:30 am	14
UFMP Action Plan interbureau team	October	3 (UFC members)
Citywide Land Use Group	October 22 nd , 7:00 pm	15
Bureau Directors Group	November 8 th , 10:30 am	
Development Review Advisory Committee(DRAC)	December 13 th , 7:30 am	12
Bureau Directors Group	December 13 th , 10:30 am	
2008		
E. Portland Neighborhood Office/Coalition	January 9 th , 2008 6:30pm	11
DRAC	January 10 th , 2008, 7:30am	14
Citywide Parks Group	January 17 th , 7:00 pm	24
Columbia Slough Drainage Districts	January 24 th , 11:00 am	7
Citywide Land Use Group	January 28 th , 7:00 pm	11
SWHRL (attended meeting about history of forested SW area; discussed tree project in March)	January 30, 7:00 pm	50+
Johnson Creek Watershed Council	February 19 th 5:30pm	20
Urban Forestry Commission	February 21 st 7:30am	12
SWHRL	March 4 th , 7:00 pm	16
Group Mackenzie SDG participants	April 3 rd	2
Tryon Creek Watershed Council	April 14 th	11
BES Watershed Managers Group	May 28 th	
Commissioner Saltzman & Parks Foundation	June 30 th	4
Stakeholder group with Portland Plan	August 15 th	10
Urban Forestry Commission	August 21 st	13
Bureau Directors	November 13 th	
UFC subcommittee	November 14 th	3
Urban Forestry Commission	November 20 th , 8:00 am	10
2009		
Urban Forestry Commission	January 22 nd , 8:00 am	5
Citywide Land Use Group	January 26 th , 7:00 pm	30
Urban Forestry Commission	February 6 th , 12:30pm	8
Planning Commission	February 10 th , 1:30 pm	30
Watersheds Advisory Committee	February 11 th , 4:15 pm	14
E. Portland Neighborhood Office	February 11 th , 6:30 pm	10
DRAC	February 12 th , 7:30 am	11
Citywide Parks Group	March 19 th , 7:00 pm	
Sustainability Commission	April 28 th , 2:00 pm	4
Urban Forestry Commission (R&R comm.)	May 20 th , 9:00 am	(4 UFC commissioners)
Urban Forestry Commission	May 21 st , 9:00 am	6
Urban Forestry Commission (R&R comm.)	May 29 th , 9:00 am	(4 UFC commissioners)
Commissioner Saltzman	June 16 th , 10:00 am	
Urban Forestry Commission	June 18 th , 8:00 am	10
Urban Forestry Commission (policy cmte)	June 26 th , 2:00 pm	2
Urban Forestry Commission	July 16 th , 8:00 am	##
Multnomah County Drainage District	July 30 th , 10:30 am	7
Audubon of Portland	August 5 th , 3:00 pm	2

Citywide Tree Policy Review and Regulatory Improvement Project Update

Urban Forestry Commission (policy cmte)	October 6 th , 10:00 am	4
Urban Forestry Commission	October 15 th , 7:30 am	11
Southwest Hills Residential League	October 21 st , 7:00 pm	
Citywide Land Use Group	October 26 th , 7:00 pm	
Partners in Community Forestry Nat'l Conf	November 10 th , 3:00 pm	65
DRAC	November 12 th , 7:30 am	20
East Portland Neighborhood Office	December 9 th , 6:00 pm	6
Urban Forestry Commission (policy cmte)	December 11 th , 9:00 am	3

2010

Urban Forestry Commission (policy cmte)	January 6 th , 7:00 am	3
Commissioner Fish	January 6, 10:00 am	
Urban Forestry Commission	February 18, 8:00 am	10
Russell Neighborhood Association	February 18, 6:00 pm	5
Citywide land Use Group	February 22, 7:00 pm	13
Planning Commission Briefing	February 23, 6:00 pm	12
Multnomah County Planning Staff	February 25, 3:00 pm	
Planning Commission Briefing (special)	March 4, 10:00 am	4
East Portland Neighbors Park Group	March 4, 7:00 pm	6
Public Open House (West)	March 9, 7:00 pm	8
Multnomah County Drainage Dist. (dir.)	March 10, 1:00 pm	2
Johnson Creek Watershed Council (dir.)	March 10, 4:00 pm	1
DRAC	March 11, 8:00 am	20
Homebuilders Association	March 11, 10:00 am	22
Urban Forestry Commission (policy cmte)	March 15, 8:00 am	3
Public Open House (East)	March 16, 6:30 pm	12
Urban Forestry Commission	March 18, 7:30 am	15
Mayor Adams	March 22, 3:00 pm	
Planning Commission/UFC hearing	March 23, 6:00 pm	60
Port of Portland	March 29, 3:00 pm	5
Columbia Slough Watershed Council	March 29, 6:30 pm	15
CNN Coalition (LUTOP)	April 5, 7:00 pm	8
Group McKenzie (conf call)	April 9, 9:00 am	2
Bureau Directors	April 9, 2:30 pm	
Columbia Corridor Golf Course Reps	April 12, 10:00 am	2
Planning Commission/UFC Worksession	April 13, 12:30 pm	30
John O'Shea, Arborist	April 14, 4:00 pm	1
Urban Forestry Commission	April 15, 8:00 am	15
PP&R Horticulturists	April 22, 1:30 pm	
Homebuilders Association (Mayor's Office)	April 27, 2:00 pm	7
Planning Commission/UFC Worksession	April 27, 6:00 pm	10
BPS Greenbag	April 28, 12:00 pm	
Planning Commission/UFC Worksession	May 11, 6:00 pm	8
DRAC	May 13, 8:00 am	15
Bureau Directors	June 2, 3:30 pm	
Planning Commission Worksession	June 8, 12:30 pm	12
Bureau Directors	June 18, 11:00 am	
UFC Worksession	June 17, 9:00 am	4
North Portland Coalition (NPLUG)	June 21, 7:00 pm	5
Save Our Elms/ R.Ross, P. Livingston	June 28, 12:00 pm	2

Citywide Tree Policy Review and Regulatory Improvement Project Update

e-mailed Project Scope for review to the following individuals and groups:

Citywide Parks Group	Friends of Trees
Neighborhood Coalitions	Individual developers and arborists
Homebuilders Association of Portland	Urban Forest Action Plan Team
Coalition for a Livable Future	Columbia Corridor Association
Audubon Society of Portland	Multnomah County Drainage District
Metro	Port of Portland
Development Review Advisory Committee (DRAC)	Columbia Slough Watershed Council
Bureau Directors Group	Johnson Creek Watershed Council
Citywide Land Use Chairs	Tryon Creek Watershed Council
Urban Forestry Commission	

Stakeholder Interviews	Date	# of public participants
Developers	November 28, 2007	3
Developers	January 24 & 25, 2008	3
Arborists	January 29, 30 & Feb 5, 2008	3

Stakeholder Discussion Group	Date	# of public participants
Meeting #1	March 12 th , 2008	21
Meeting #2	April 11 th , 2008	15
Meeting #3	April 25 th , 2008	15
Meeting #4	May 9 th , 2008	15
Meeting #5	May 23 rd , 2008	13
Meeting #6	June 13 th , 2008	16
Meeting #7	June 27 th , 2008	11
Meeting #8	July 11 th , 2008	11
Meeting #9	July 25 th , 2008	12
Meeting #10	August 22 nd , 2008	16
Meeting #11	September 12 th , 2008	13
Meeting #12	September 26 th , 2008	10
Meeting #13	October 10 th , 2008	16
Meeting #14	October 24 th , 2008	14
Briefing	January 30 th , 2009	15
Proposal Briefing	March 3 rd , 2010	16

Other	Date	# of public participants
DRAC/Impact Assessment Game	December 18 th 2007 3-5pm	1

**Estimated Canopy Benefits and Program Costs
July 14, 2010**

		Simplified			Original				
		Canopy Benefits acres planted/preserved per year	Staffing/Cost ^Δ	Funding Source	Canopy Benefits acres planted/preserved per year	Staffing/Cost ^Δ	Funding Source		
Tree Canopy Enhancement, Regulatory Improvements									
1	Land Use Reviews - Improved tree preservation.	5.5 to 16.5 acres	0.60 FTE	\$57,100	Fee~\$65-290	7 to 22 acres	1.50 FTE	\$142,800	Fee~\$130-365
2a	Building Permits - New Tree Density Standards.	60 acres	0.75 FTE	\$71,400	Fee ~\$60	60 acres	0.70 FTE	\$66,600	Fee ~\$94
2b	Building Permits - New Tree Preservation Standard.	50 acres	0.75 FTE	\$71,400		53 acres	1.20 FTE	\$114,200	
2c	Building Permits - Tree Inspections.	Spot check	1.10 FTE	\$104,700		Trees monitored throughout development	4.10 FTE	\$390,300	
3	Capital Improvement / Public Works Project Oversight.	Integrate, protect, replace existing trees	0.80 FTE*	\$120,000	Capital ~\$800	Integrate, protect, replace existing trees	0.80 FTE*	\$120,000	Capital ~\$800
4	Environmental zones - Consistent treatment for trees.	Addressing trees on 1400 add'l acres	0.00 FTE	\$0		Addressing trees on 1400 add'l acres	0.00 FTE	\$0	
5a	Standardized Tree Permit System and Programmatic Permit.	4 to 5 acres	0.80 FTE	\$76,200	General Fund	7 to 32 acres	1.80 FTE	\$171,400	General Fund
5b	E-zone pruning Permit.	increased health, reduced fire risk	0.10 FTE	\$9,500	General Fund	increased health, reduced fire risk	0.10 FTE	\$9,500	General Fund
SUBTOTAL		120 to 130 acres	4.90 FTE	\$510,300		127 to 167 acres	10.20 FTE	\$1,014,800	
cost per acre canopy		\$3,900 to \$4,300 per acre			\$6,000 to \$8,000 per acre				
# trees purchased in lieu of cost		851 trees			1,691 trees				
Acres of canopy w/ purchased trees		12 acres			23 acres				

Customer Service Improvements (on-going)									
6	Single point of contact.	Urban Forestry in DSC	1.15 FTE	\$109,500	General Fund	Urban Forestry in DSC	1.15 FTE	\$109,500	General Fund
7	24-hour hotline.	Pilot using existing BES spill response	0.10 FTE	\$9,500	General Fund	Pilot using existing BES spill response	0.10 FTE	\$9,500	General Fund
SUBTOTAL			1.25 FTE	\$119,000			1.25 FTE	\$119,000	

Other 1-Time Costs									
8	Community Tree Manual.	Create manual w/ outreach	1.00 FTE	\$95,200	Grant?	Create manual w/ outreach	1.00 FTE	\$95,200	Grant?
9	Neighborhood Tree Plan.	Forest mgmt at neighborhood scale		-----	Grant?	Forest mgmt at neighborhood scale		-----	Grant?
10	Permit Tracking Software Programming.	Program one permit folder		\$32,000	General Fund	Program two permit folders		\$64,000	General Fund
11	One Time Start Up Costs (vehicles, equip).	3 vehicles		\$90,000	General Fund	8 vehicles		\$240,000	General Fund
ONE TIME TOTAL			1.00 FTE	\$217,200			1.00 FTE	\$399,200	
ON-GOING TOTAL			6.15 FTE	\$629,300			11.45 FTE	\$1,133,800	

^Δ FTE Costs are based on \$68,000 annual salary plus benefits. The indirect overhead costs are not included in \$, but are included in estimated fees.

*Staff costs for CIP/PW is higher based on \$92/hr rate quoted

** Training may require up to .5 additional FTE, depending on phasing of code implementation.



Code Consolidation and Restructuring

New Title 11 – “Trees” focuses on the Urban Forest. Title 11 Trees consolidates City tree rules into a cohesive framework, addressing trees on public and private property, and in development and non-development settings. Title 11 elevates the Urban Forestry Program and shifts the paradigm to “trees as infrastructure.” Title 11 establishes technical standards and procedures, clarifies bureau roles, and simplifies existing enforcement procedures.

Tree Canopy Enhancement

Improved tree preservation through land use reviews. Code amendments would improve tree preservation in land divisions, prioritizing large healthy trees, native trees, and groves. Tree plans would be recorded with final plats and would sunset after 10 years. Tree preservation would also be considered in Design Reviews & Conditional Use Reviews.

New Tree Density Standards would achieve canopy targets on development sites. New Tree Density Standards are designed to meet canopy targets over time. They build on existing “T1” standards for new single family homes, and would apply to all development types through the building permit process. Applicants choose to preserve, plant, or pay into the Tree Fund to meet the standard. The standards would not trigger review or delay permits.

New Tree Preservation Standard adds incentive to preserve. In addition to Tree Density Standards, the proposal would set a target to preserve a percentage of 12” diameter or larger trees, and require a mitigation payment if the target is not met. The draft proposal has been substantially simplified to better support City development and urban forestry goals. Lots smaller than 3000 sq.ft. or with greater than 90% building coverage would be exempt but must meet Tree Density Standards.

Trees on Property Lines and Adjacent Sites better protected. The proposal would allow applicants to count trees on property lines toward preservation and density standards so long as root zone protection is provided. The proposal would better protect trees on adjacent sites through land divisions, design reviews, and conditional uses.

Consistent treatment for trees in environmental zones. The proposal would: 1) establish replacement requirements for trees in environmental zone transition areas and non-native tree species, and 2) ensure consistent application of water body setbacks in existing environmental zones, enhancing tree protection in sensitive riparian areas.

Streamlined, Standardized Tree Permit System, E-zone Pruning Permit, Programmatic Permit. The proposal would create a standardized tree permit system for City, Street, and Private Trees. The existing exemption for single family lots is replaced with a “homeowner” system to ensure violations are prevented, and that larger trees (20” diameter and larger) are replaced with a new tree. For currently regulated lots, required tree replacement is fair and simple, while discouraging removal of large healthy trees or multiple trees. A permit to allow limited tree pruning in environmental zones would support tree health, home gardening and solar energy systems, and reduce wildfire risk. A new Programmatic Permit for routine public agency activities would improve efficiency and encourage restoration.

Customer Service Improvements

Single point of contact, 24-hour hotline and automated permit tracking system. These elements would improve public access to tree-related information, improve City program efficiency, and support compliance efforts.

Community Tree Manual. User-friendly guide to tree rules, tree care and best practices and community tree resources.

Neighborhood Tree Plan. Working with residents to inventory trees and set priorities at a neighborhood scale

Appendix B

**Record of Testimony to the Portland
Planning Commission and Urban Forestry Commission
(March - July 2010)**

**Complete Record of
Written Testimony
For the Citywide Tree Project**

Received during the
Planning Commission/Urban Forestry Commission
Public Hearing and Work Sessions:

UFC/ PC Joint Public Hearing, March 23, 2010
UFC/ PC Joint Work Session I, April 13, 2010
UFC/ PC Joint Work Session II, April 27, 2010
UFC/ PC Joint Work Session III, May 11, 2010
PC Work Session IV, June 8, 2010
UFC Work Session IV, June 17, 2010

Written Testimony Submitted for PC/UFC hearing on Citywide Tree Project

	Name	Organization	Date
Submitted for 3/23/10 record			
1	Esau, Rebecca	Bureau of Development Services	3/22/10
2	Marriott, Dean	Bureau of Environmental Services	3/22/10
3	McAllister, David	Portland Parks and Recreation	3/23/10
4	Stuhr, Michael P.	Portland Water Bureau	3/23/10
5	Bentley, Judith		3/16/10
6	Boutillette Brinkman, April		3/23/10
7	Bussard, Michelle D	Forest Park Conservancy	3/23/10
8	Carney, Jo		3/16/10
9	Christ, M'Lou		3/21/10
10	Cumming, Cheyne		3/20/10
11	Edwards, Ginger		3/22/10
12	Ensign, Diane		3/22/10
13	Fish, Jeff	Fish Construction NW, Inc.	3/23/10
14A	Fogarty, Scott	Friends of Trees	3/23/10 testimony (submitted 4/13/10)
14B	Kelly, Veronica		3/23/10
15	Lightcap, Brian	W Mult Soil & Water Cons District	3/18/10
16	McKnight, Bonny		3/23/10
17	Nash, Nana, M.A.	Center NA	3/23/10
18	Nielsen, David	Home Builders Assoc. Metro Portland	3/23/10
19	Okulam, Frodo		3/21/10
20	Parks, Brian		3/23/10
21	Phillips, Garrett		3/23/10
22	Prince, Tracy J., Ph.D.	Goose Hollow NA	3/17/10
23	Preeg Riggsby, Terri	Tryon Creek Watershed Council	3/22/10
24	Sallinger, Bob Labbe, Jim Houck, Mike Carley, Ron Fuglister, Jill	Audubon Society Portland Audubon Society Portland Urban Greenspaces Coalition for a Livable Future Coalition for a Livable Future	3/23/10
25	Schill, Eileen		3/20/10
26	Seton, Nancy	SWHRL NA	3/23/10
27	Shafer, Dick	Peninsula Drainage Dist #2	3/23/10
28	Williams, Carol		3/21/10
Submitted for 4/13/10 Record			
29	Barnett, Margot		4/1/10
30	Bouillion, Tom	Port of Portland	4/13/10
31	Clark, Matt	Johnson Creek Watershed Council	4/12/10
32	Desmond, Jim	Metro, Sustainability Center	4/12/10
33	Elan, Robert		4/12/10
34	Fish, Jeff	Fish Construction	4/13/10

Written Testimony Submitted for PC/UFC hearing on Citywide Tree Project

35	Gibbon, Jon		4/13/10
36	Goldfeder, Simone	Architect LEED AP	4/4/10
37	Loff, John	Riverside Golf and Country Club	4/13/10
38	McAllister, David	City Forester, Portland Parks	4/12/10
39	McKnight, Bonny		4/12/10
40	Quinn, Barbara	Friends of Cathedral Park NA	3/26/10
41	Reese, Alesia	East Portland Parks Coalition	4/6/10
42	Robinson, Linda		4/13/10
43	Stark, Eileen	Second Nature Garden Design	3/25/10
44	Stark, Eileen	Second Nature Garden Design	4/6/10
45	Thayer, Jim	SWHRL	3/23/10 (missed in earlier transmittal)
46	Todd, Judy		3/31/10
47	Van Dyke, Jane	Columbia Slough Watershed Council	4/9/10
48	Vogel, Mary	PlanGreen	4/8/10
49	Weber, Richard		3/28/10
50	Wentworth-Plato, Jim	Emerald Tree	3/24/10
Submitted for 4/27/10 Record			
51	Scarlett, Paul	BDS	4/26/10
52	BES Tree Code Option		4/27/10
53	Colasurdo, Christine		4/13/10
54	Nielson, David	Homebuilders Association	4/27/10
55	Wright, Tom	Group Mackenzie	4/12/10
56	Schifsky, Greg		4/27/10
Submitted for 5/11/10 Record			
57	Bassos, Alex	HAND	4/29/10 (dated 3/23/10)
58	Esau, Rebecca	BDS	5/11/10
59	Fike, Jean	East Multnomah Soil and Water Conservation District	5/10/10
60	Gorlin, Lisa		5/6/10
61	Leggett, Nicole		5/10/10
62	Livingston, Peter		5/10/10
63	Livingston, Peter		5/11/10
64	Ross, Richard	Save Our Elms	5/11/10
65	Jenny Wadman		5/11/10
Submitted for 6/8/10 Record (close of Planning Commission record)			
66	Leitgeb, Brian	Columbia Edgewater Golf Course	5/18/10
67	Haney, Richard	Portland Fire & Rescue	5/25/10
68	Ross, Richard	Save Our Elms	6/7/10
69	Bassos, Alex	HAND	6/7/10
70	Netusil, Noelwah	Reed College	5/28/10
71	Gibbon, John		6/8/10
Submitted after 6/8/10			
72	Jim Wilson		6/11/10



**City of
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Bureau of Development Services**

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MEMO

Date: March 22, 2010

To: Portland Planning Commission
Portland Urban Forestry Commission

From: Rebecca Esau, Manager, Land Use Services Division, BDS

CC: Susan Anderson, Paul Scarlett, Zari Santner, Dean Marriott, Joe Zehnder, Roberta Jortner, David McAllister, Stephanie Beckman, Morgan Tracey, Mary Wahl, Ross Caron, Ty Kovatch, Mike Liefeld, Douglas Hardy, Kimberly Tallant, Kim Freeman, Rob Crouch, Kathleen Murrin, Frank Krawczyk

SUBJECT: Citywide Tree Project - February 2010 Proposed Draft

The Bureau of Development Services (BDS) appreciates the opportunity to review the Proposed Draft of the Citywide Tree Project. The bureaus involved in the development and review of this project have agreed to postpone testimony until the April session so as to preserve time for public testimony at the March hearing. We are submitting this memorandum into the record to communicate our support of the goal to achieve increased tree canopy in the City of Portland, and to outline key policy discussions and issues we have been discussing with Bureau of Planning and Sustainability (BPS) staff as the project has developed.

BDS is fully supportive of the goal to increase tree canopy in the City of Portland. The question is how best to increase tree canopy in ways that meet the project's stated criteria for success:

- Designed to support multiple City goals
- Clear and transparent
- Consistent, cohesive and comprehensive
- Fair and equitable
- Complementary and reinforcing
- Efficient and cost-effective
- Customer friendly – easy to understand and work with
- Funded adequately for implementation and enforcement

As you know, a code development project is a long, iterative process. The Citywide Tree Project is no exception. The Bureau of Development Services staff have been involved in this project from the beginning. We have attended countless meetings, actively commented on policy development, and provided input on each iterative draft, always with the interest of keeping the regulations simple and user friendly for the public, and for the bureaus who will be working with these regulations for the years to come.

It has been important to keep the Citywide Tree Project on its timeline, and so despite the continuing discussions about alternative ways to best achieve the goal of increased tree canopy, it was necessary to publish the February 2010 draft, and move forward with this hearing. So although there is one alternative

that has been published, at this stage in the process, BPS staff, BDS, BES, and the City's Urban Forestry staff continue to discuss simplified and streamlined alternatives to the published draft that meet the success criteria stated above. To be very clear, the Bureau of Development Services is not supportive of the draft published in February because:

- it is overly complex; and
- it will be very difficult for users, both City staff and the general public, to understand and implement.

BDS has consistently advocated for a simple, straight-forward, and practical set of regulations.... regulations that can be grasped easily by any property owner. On the continuum from simplicity to greater complexity, there are problems at both ends of the spectrum:

- the simpler the regulations, the more control of the details is relinquished, and you have a broad-brush approach that doesn't address specific situations and can be impractical or unreasonable;
- the more complex the regulations, the fewer people understand them, the greater the confusion about them, and the more time-consuming and expensive the implementation, to the point that the cost outweighs the benefit.

For example, at the simple end of the spectrum, you could have a tree program solely requiring one-tree-for-one-tree replacement, with no exceptions. If you cut a tree down, you have to plant a tree. It's simple, and it doesn't get into the details of the size or species of the tree to be cut or the species of the replacement, or how many trees you might already have on your lot, or if there's any reasonable location for a tree on the lot. Another example of a very simple tree program would be to have a minimum tree density standard apply to every lot in the City, for example, a requirement to have at least one tree for every 2,000 square feet of lot area, period. It is easy to understand and explain, but again, you lose some ability to prioritize which trees are more valuable compared to other trees, or how to handle situations where 100% building coverage is expected and desired, etc. These examples illustrate the simplicity end of the spectrum and the published draft is closer to the complex end of the spectrum. BDS is hoping to find something more in the middle. Finding the appropriate balance between simplicity and complexity is always challenging, as is finding the appropriate balance between flexibility and practicality for each situation on the one hand, and certainty and predictability on the other hand.

BDS is committed to achieving an increase in the City's tree canopy through the collaborative development of a much simpler set of regulations and incentives. In order for tree regulations to be successful:

1. the regulations need to be simple - it should be possible to explain them to someone in 5-10 minutes;
2. the regulations need to be practical and reasonable;
3. the regulations need to be clear, resulting in predictable outcomes for property owners, developers, and neighbors, etc.
4. the regulations need to be sustainable over time from a budget perspective, with adequate funding for all aspects of implementation, including:
 - a. a robust and ongoing public information, outreach and education component
 - b. staffing to administer the regulations in non-development situations
 - c. staffing to administer the regulations in development situations and perform the necessary functions:
 - plan review;
 - inspections prior, during and after construction;
 - responding to complaints and un-permitted tree cutting; and
 - responding to general questions about the regulations from the public.

And if there is awareness, understanding, and "buy-in" from property owners, then that goes even further toward helping the city achieve our tree canopy goals. For example, if we force someone to plant six trees on the back of their lot, and they only wanted one, they perceive the government as being unreasonable, and heavy-handed, AND it is likely that they will let most of the trees die to eventually get to what they wanted in the first place. People are much more likely to care for a tree they wanted on their

property. We need to work with that positive motivation and encourage it through reasonable requirements and options.

As one of the main implementation bureaus, BDS strongly believes it is necessary to craft a radically simplified proposal. Toward developing a more streamlined set of regulations, we urge you to consider some larger policy issues, such as those identified below:

1. Reliance on incentives or regulations, or some blending of the two. Is it possible to rely on incentives more than regulations to achieve the goal of increased canopy? In situations where a developer might be able to preserve a tree, but would be inclined to cut it down, what are effective incentives that the City could offer to preserve the tree? The proposal offers some flexible development standards to facilitate tree preservation, and this is good. What else could be offered to incent or remove obstacles to tree preservation?
2. Where to get the increased canopy...the right-of-way or private property? We have 26% tree canopy in Portland which is very good. It is consistent with the national average. As a comparison, Seattle has an 18% tree canopy. Our goal of 33% is in reach. Is it possible to achieve the goal of increased tree canopy by focusing our efforts first on getting more street trees or trees on City-owned land, and secondly on regulating trees on private property? Is it possible to achieve the goal of 33% tree canopy by solely focusing on street trees, and keeping the tree regulations on private property to a very simple minimum?
3. Should trees on lots that are already developed be regulated in the same way, and to the same extent, as trees on sites that are being developed? For example, should a vacant single-family residential lot be given some allowance to remove trees at the time of development because the City expects and wants a house to be developed there? Or should they have to mitigate for all of the trees that they remove, even though it would be impossible to develop the lot with all of the trees preserved? If you opt for treating development situations and non-development situations the same and requiring replacement of trees even if they are in a reasonable building footprint, does it: a) unduly penalize property owners who have a lot of trees on their vacant lot; and b) become like a tree tax, since there is usually no feasible way to plant that many mitigation trees on a lot that is being developed, so the property owner would end up paying into the Tree Fund, in lieu of planting. We are struggling with what is fair and equitable.
4. Does the City want an urban forest that is constantly being regenerated through re-planting with trees of all sizes valued, or should greater value be placed on the preservation of large trees? The project goal is to increase tree canopy and to promote a healthy urban forest. Greater canopy can be achieved by planting more trees, or it can be achieved by preserving more of the large trees on sites where it is practical to do so, or some combination of these approaches. What is the simplest way to achieve greater canopy, while accommodating the development and infill envisioned for the City, as well as the other sustainable things people want to do with their property, such as growing their own fruits and vegetables, installing solar panels and maximizing use of natural light, building attached and detached accessory dwelling units, etc.?
5. In what situations does it make sense to say a large tree must be preserved, and what are we willing to give up for this goal? Would we tell someone they couldn't have a vegetable garden? Would we tell someone they couldn't have an on-site parking space or garage? Would we tell them they couldn't have two residential units, but could only have one, despite what the site's residential density allowance? Would we tell someone they couldn't have the 2,000 square foot footprint of the house, but would need to re-design for a smaller footprint? Would we allow them an exception to the requirement for on-site stormwater infiltration? Is it possible to preserve large trees in a way that is also practical, given the City's residential infill goals and the fact that the majority of development sites we deal with are small, constrained lots with very little room to avoid impacts to large trees on site?

As you listen to testimony, please keep in mind that:

1. People like trees, and that's good. We want them to continue to like trees, and not be hesitant to plant them or preserve them because of the dread of dealing with a complex system of rules and reviews and the cost of permits. Also, it is very expensive to remove a large tree, so people generally do not remove them without a good reason.
2. People suspect other property owners of cutting down trees needlessly, and have the perception that the city is losing a lot of large trees. You will hear a lot of passion and emotion about the perceived loss of large trees in the city, but there is an absence of data on how much we have actually lost, where, and why. Large trees may have been cut down for very good reasons, such as disease, or root damage to building foundations, or to build a new home, etc. The perceived problem may be larger than the actual problem.
3. The proposed draft is over 500 pages. This complexity has made it difficult for many in the public to read and comprehend the entirety of the regulations. This leads some to rely on assumptions with regard to what this proposal does or doesn't do. For example, some people think that the proposal will ensure the preservation of large trees. While the proposal provides a preservation standard, preservation is not required, and trees may be replaced, or a payment in lieu can be made if the tree can't be saved. (See point #5 on page 3 for questions about if a tree can be preserved or not, and trade-offs to consider.)
4. You will hear phrases like, "*Portland is becoming a city of small trees.*" Please ask the question, do they mean "young" trees, which are small because they are young, or do they mean "small" trees, trees that will be small even at maturity, like Japanese Maples? We've heard complaints about the "sticks" people have planted. The "sticks" will eventually become large trees. We need to think long-term. Healthy forests need to be re-generated continually over the long-term, and this happens through the planting of new, "small" trees that at maturity will contribute to the city's tree canopy. Also, it is important to plant **the right tree for the right place**. With a significant amount of our infill development being on lots 5,000 square feet and smaller, it may be both impossible to preserve a large tree, and appropriate to plant a tree that will, at maturity, be smaller than what was there previously.
5. If you polled Portland property owners, the majority of them probably have no idea that the City has any tree regulations and it wouldn't even occur to them to ask if they need a tree cutting permit. They also are not aware of this current proposal. The point is that ongoing outreach and education are key to any regulatory approach to trees, and this requires dedicated funding on an ongoing basis.

Whatever regulatory solution you choose to pursue:

1. We ask that you test it with several different case scenarios before recommending it to City Council.
2. We ask that you also test it by each of you trying to explain the regulations to someone in 5-10 minutes, and having them understand it.
3. We ask that it not try to solve all of the tree problems that can be conceived of, but that it follow the 80-20 rule, i.e., that it be a good approach for 80% of the situations.
4. We ask that it not be heavy-handed and overly expensive in a way that turns the public against trees, un-doing the good work Urban Forestry staff has done in promoting the planting, care, and preservation of trees in the City.
5. We ask that you think broadly about all of the City goals we are trying to achieve on small infill lots, including many of our sustainability goals, such as dealing with stormwater infiltration on-site, solar panels, vegetable gardens, fruit trees, natural light for windows, etc. and how these goals mesh with tree preservation and tree density standards on small, constrained sites. Natural light and sunshine are valuable commodities as are trees and shade....please strive for balance as well as providing options for people.

6. We ask that you remember that the success or failure of any regulation is largely based on adequate, ongoing funding to support implementation.

Again, BDS has been working closely with the BPS staff for the entirety of this project, and have expressed our interests and concerns to them as the project has progressed. BDS will continue to work with BPS and the other bureaus involved on these issues, and are exploring alternatives with them for your consideration at your next session in April. We hope that the questions and issues raised in this memorandum are helpful to you as you begin to delve into the details of this very important project, and grapple with the policy, implementation, and financial aspects of the different choices you make. We look forward to working with you as the project progresses.



CITY OF PORTLAND ENVIRONMENTAL SERVICES



1120 SW Fifth Avenue, Room 1000, Portland, Oregon 97204 • Dan Saltzman, Commissioner • Dean Marriott, Director
March 22, 2010

TO: Planning Commission and Forestry Commission Members
FROM: Dean Marriott **DM**
CC: Roberta Jortner, BPS; Mary Wahl, BES
RE: BES Support / Comments on Tree Policy Package Proposal

Thank you for the opportunity to share some thoughts on the consolidated Tree Code proposal before you on March 23rd. BES serves a variety of roles in planting and protecting trees including taking the lead on watershed health improvements, managing the City's stormwater runoff, and running as the sewer and stormwater utility for the City. Trees are a \$5 billion dollar asset of the City and provide drainage and watershed health ecosystem services, often for a fraction of the cost of providing single-objective grey infrastructure solutions.

BES submits the following comments to the Planning and Urban Forestry Commissions:

Project Proposal Support

- A. *Uniform application of regulations.* BES agrees with the removal of the current single family exemption from tree cutting regulations. This reinforces that all properties are important in sustaining Portland ecosystems and the tree infrastructure asset.
- B. *Tree Trigger Size of 12 inches.* BES has long advocated regulation down to a 6 inch size, but will support the 12 inch trigger size in the proposal. BES staff will continue to support the smaller tree size in the future since smaller trees are critical ecosystem assets.

BES is not supportive of increasing in the trigger size to 20 inches or more. A large amount of the City's tree canopy would be unprotected by moving to the 20 inch from the 12 inch trigger. Many of the trees we plant today are smaller varieties and may never reach without reasonable protection.

- C. *Flexibility for Capital and Public Works Projects.* BES appreciates BPS' work to provide enhanced flexibility for City projects and programs that allows City agencies to work with the Urban Forester to address trees in a meaningful way. The flexibility of programmatic permits, alternative root protection methods, and flexibility in locations of mitigation plantings will allow BES to maximize the effectiveness of existing tree protection, mitigation and planting efforts.

- D. *Tree Density and Tree Protection Standards.* BES supports the proposals related to property development, both during the land use and building permit stages. Although

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T. Z

the preservation standards might appear to be complex, they equitably address tree protection on every developing property. By providing tree density standards for all property uses, the City is again reinforcing that every tree is part of our collective green infrastructure and that equity across properties is important.

- E. *Nuisance Tree Removal.* Nuisance trees, while providing important stormwater management, erosion control and shading benefits, are a detriment to healthy watersheds. This code proposal does a good job balancing the needs for removing invasives, retaining tree canopy, and providing important environmental benefits in support of the City's Clean Water Act compliance efforts.

Requested Modifications to the Proposal

1. *Retention of the Significant Tree List for Land use Reviews.* The current land division code has a list of 18 *very* slow growing native trees (e.g., Pacific yew, Oregon white oak, and Pacific madrone) that need protection at small sizes. These trees are a priority for preservation. For ease of implementation, BPS and BDS have modified the proposal to cover only 6 inch Madrone and Oregon Oak. The full list should be maintained in review situations to create an expectation of preservation of those trees when the City negotiates with developers about which trees the City wants to see retained. *Retention of these 18 or more trees needs to stay a priority, and that this issue needs further work by the full staff working group to evaluate what trees are on the list and how it's used.*
2. *Grove / Stand Protection.* It is not clear that protection of groves/stands is *always* a priority (which we believe is the intent of the project). Further, the current proposal offers protection only for the 12 inch or larger trees within the grove, not for any other vegetation in the grove. The small trees and/or shrubs that help provide the continuous cover necessary as part of a grove or a stand are subject to removal, virtually eliminating the values that make groves a priority. This issue should be revisited.
3. *Street Related Removal Mitigation Reduction Options.* City bureaus have discussed minimizing mitigation for trees removed when the City requires a builder to make a street improvement. BES is supportive of an option to require tree-for-tree mitigation only in situations where trees are removed at City Engineer direction. Such a level of mitigation balances the costs and process burdens on a builder who is already providing an expensive public improvement for the City's infrastructure needs. BES would *not* be supportive of a full exemption from tree mitigation for these projects.

Priority Implementation Actions

The following activities should be completed before the end of calendar year 2010:

- *A Comprehensive Tree Manual.* The City needs to develop a Tree Manual scope that recognizes and supports *all* the values of trees, not just canopy or stormwater management. *BES feels the detailed, multi-bureau discussions needed for such a comprehensive manual are critical to implementing these new regulations and the City's other canopy, watershed health and community livability goals.*
- *Administrative Rules.* While code package development has been a comprehensive process, there is a significant need to document how staff will implement the code. Routinely that is done through administrative rules. Significant details in the Title 11

proposal that lend themselves to a rules package include: decision making on the correct level of mitigation given extenuating circumstances, how mitigation funds are spent, appeals processes and timelines, and programmatic permit criteria.

- *Funding.* The Commissions should advocate for a specific, multi-bureau process to look at new sources of new funding for the tree review, education, and, most critically, inspection and enforcement processes identified by this project. There may also be opportunities to evaluate other tree and natural resource issues such as leaf pick up, replanting efforts, invasive removal efforts, and tree or natural area maintenance in that evaluation.
- *Portland Plan Efforts.* There are a variety of issues that also need to be considered within the Portland Plan work to make tree preservation and planting reasonable and supportive of larger, evergreen trees. Increasing planting strip widths would allow space for large trees and for green street facilities. Assuring sufficient planting and pervious space is available for trees on private lots is also a priority.

Early Implementation Actions

There are a number of items within this code proposal that are cost neutral or are prerequisites for implementing the proposed code in 2011, and could be implemented in 2010, including but not limited to:

- Implementing tree fund usage changes – allowing spending on a broader variety of tasks;
- Clarifying tree definitions;
- Modifying and clarifying who may apply for permit changes;
- Implementing programmatic permits;
- Implementing the diseased wood parts of the code;
- Activating the allowance for tree master plans for conditional use sites;
- Allowing the density, pedestrian path, front set back and other flexibility within the zoning code; and
- Initiating BES ex-officio membership in the Urban Forestry Commission

Thank you for your time and efforts directing this code improvement and future implementation work. BES is strongly committed to assisting or leading efforts, where needed.



PORTLAND PARKS & RECREATION

Healthy Parks, Healthy Portland

MAR 23 2010

Date: March 23, 2010
To: Portland Planning Commission
Portland Urban Forestry Commission
From: David McAllister, City Forester and City Nature Manager
Re: Comments on Public Draft – Citywide Tree Policy Review

There are three key elements to successfully meeting the tree canopy goals of the City – a regulatory program, an educational program, and an incentive program. This Tree Policy review tackles the regulatory piece, and as such, is an opportunity to improve the City's current regulatory program in a number of areas.

Urban Forestry is committed to working with the Bureau of Planning and Sustainability to improve Portland's tree regulations. Over the last several years something on the order of 2000 hours of forestry staff time has been committed to this subject. Based upon our 30 years of experience and broad understanding of the current conditions and future challenges, Urban Forestry has focused on the following outcomes for this project:

- Fairness and equitability – Tree removal mitigation standards should be equivalent for both development and non-development situations e.g. a level playing field.
- Tree Preservation and mitigation – Both tree mitigation and tree preservation are necessary. Tree preservation maintains the current trees and benefits while mitigation provides future trees and future benefits. Each of these regulatory approaches should be designed to achieve its outcome rather than trading one for the other.
- Customer friendly – All tree regulations need the support of the regulated community. They should not be so complicated and confusing that they intimidate and bewilder rather than communicate the desired outcome. Complex code is often a disincentive to the intended outcome.
- Efficient and cost-effective - Ultimately City staff will have to implement any City Code that is approved. Regulations affecting trees need to provide flexibility for tree professionals to work with the public rather than the code being an impediment to this effort. Trees are living things that code, no matter how prescriptive, can adequately address. Overly complex code is also costly to the City and the regulated community. Also, costs need to include implementation, compliance monitoring, and enforcement. Cost efficiency = code efficiency

The Citywide Tree Policy Review draft under consideration moves the City in a positive direction but Urban Forestry believes that additional consultation between bureaus will improve the code language. Specifically we think that each of the four bulleted outcomes above should be modified and in some cases a different approach taken. Urban Forestry looks forward to working with planning staff during the remainder of the project and believes improvements can be made in each of these areas.

City Nature Department
1120 S.W. 5th Ave., Suite 1302
Portland, OR 97204
Tel: (503) 823-7529 Fax: (503) 823-6007

www.PortlandParks.org
Zari Santner, Director



T.3



Randy Leonard, Commissioner
David G. Shaff, Administrator

1120 SW 5th Avenue, Room 600
Portland, Oregon 97204-1926
Information: 503-823-7404
www.portlandonline.com/water



An Equal Opportunity Employer

March 23, 2010

MAR 23 2010

City of Portland Planning Commission
City of Portland Urban Forestry Commission

Re: Draft Title 11 – Citywide Tree Policy and Regulatory Improvement Project

Dear Commissioners:

The Portland Water Bureau commends the staff of the Bureau of Planning and Sustainability for the work they have put into consolidating tree regulations and drafting a new Title 11 – Trees. They have done an excellent job of working with Water Bureau staff and developing draft code changes that significantly clarify tree regulations in the City.

We support the goals of enhancing the quantity, quality, and sustainability of the urban forest. The Portland Water Bureau's remaining concerns outlined in this letter directly relate to our mission of providing reliable water service at a reasonable cost to the citizens of Portland and our need to accomplish our work quickly and expeditiously in the public rights of way. Any regulations that interfere with our ability to use the right of way for utility purposes or unduly restrict the placement of facilities on Water Bureau owned property will have an impact on the rates we must charge for water.

1. The Water Bureau requests that the Bureau of Planning and Sustainability be directed to set a minimum regulated tree size of 3" diameter at breast height (dbh) for City and Street Trees. The current draft statement that "The regulations of this chapter apply to all trees in the City of Portland that are on lands owned by the City . . ." (11.400.020) will be impossible to enforce and very costly for the Water Bureau. By having no size threshold, even the smallest seedling is regulated, making simple acts such as mowing a lawn or pulling weeds from a green roof at a City facility subject to the permitting requirements of this chapter. The costs and potential project delays associated with identification, consultation, protection, public notification, obtaining a permit to maintain/remove, and replacement greatly outweighs the benefits derived from regulating small diameter brushy vegetation that is of limited value and could be expected to grow back quickly without replacement.

The Water Bureau understands that many of our activities will be covered under a Programmatic Permit, if we decide to obtain one. However, there are public notification, tracking, and reporting requirements associated with these Programmatic Permits which will be costly to the Water Bureau if applied to the trees under 3" dbh.

T.4

2. We believe some of the tree replacement requirements outlined in 11.400.070 F. (Type A permits), 11.400.080 C. 1. (Type B permits), 11.600.060 B. and C. (City and Street Trees in Development Situations) are in conflict with other City goals and policies.

The permitting and replacement requirements for nuisance trees in the draft Title 11 are extremely confusing and create a disincentive to remove invasive trees. According to the January 2010 report to Council from the Invasive Plant Policy and Regulatory Improvement Project, the City aims to “advance the removal and management of invasive plants in conjunction with development and in non-development situations.” The requirement to replace nuisance trees larger than 3” diameter at breast height will discourage removal of the nuisance trees in the first place. As a result, the replacement requirements for nuisance trees are inconsistent with the recently adopted Invasive Plant Policy.

In addition, there are areas of the City where dense forest is not the ideal future condition. Competing interests of solar access, wellhead protection, maintenance of clear utility corridors, or support of Special Habitat Areas (as identified by the Portland Plan Background Report), are not considered adequately in the draft Title 11. Many sites with these considerations are not subject to a land use review under the Zoning Code, and so fall under the jurisdiction of the Tree Code during development. The Water Bureau requests that the Bureau of Planning and Sustainability be directed to include a procedure for establishing an alternative “Desired Future Condition” for specific sites where dense forest is not appropriate. These sites would then need to be exempt from the tree density and replacement requirements in both development and non-development situations.

3. The Water Bureau has concerns with the public appeal procedure for Type C permits outlined in 11.300.060D. Removal of a large, healthy tree will only be approved by the Forester in circumstances where absolutely necessary in order to provide essential services. A lengthy appeal process that could be initiated by members of the public would only cause delay and increase the cost of providing water to our customers.
4. The draft Title 11 contains a requirement that “Only the City staff assigned to manage or care for trees on City lands may submit an application to plant, prune or remove a City Tree” (11.300.030 B. 1. a.). The Water Bureau is concerned that there is no requirement for the owner of the land to provide permission for the care taker to apply. Also, smaller maintenance tasks may be performed by one Bureau, and larger tasks (major limb cutting or tree removal) may be contracted out to a different Bureau or private entity, making it difficult to determine who manages and takes care of these trees. We think 11.300.030 B. 1. a. should be changed to state that the City Bureau responsible for the site may submit an application.
5. The Programmatic Permit contains a requirement to notify the public prior to performing permitted activities. The Water Bureau requests that 11.300.070 C. 6. be changed to state that the outreach and notification program include a description of measures to inform the public of specified types of upcoming permitted activities. For all routine activities associated with maintenance work, the public notification process for obtaining the Programmatic Permit should suffice. Public notification of each individual action under the Programmatic Permit would be costly and infeasible.

6. The Water Bureau's Columbia South Shore Wellfield Wellhead Protection Area has restrictions on tree planting that are not reflected in the draft Title II. These restrictions are outlined in the 2008 Stormwater Manual; "Planting trees or deep rooted shrubs over the top of required polyethylene geomembrane liners is prohibited in the wellhead protection area to protect the liners from root damage. Water Bureau review is required to determine which requirements apply. In some instances, infiltration may be allowed." The purpose of this is to protect the groundwater and prevent the migration of contaminants. The Water Bureau requests that exemptions to tree planting (and replacement) requirements be written into the code for these lined facilities within the Wellhead Protection Area. This Area is currently not outlined in the Zoning Code, but is defined in the Water Code (Chapter 21.35 Wellhead Protection).

Sincerely,

A handwritten signature in black ink, appearing to read 'M. Stuhr', written over a horizontal line.

Michael P. Stuhr, P.E.
Chief Engineer, Portland Water Bureau

Cc: David Shaff, PWB

Hamilton, Joan

From: JUDBENTLEY@aol.com
Sent: Tuesday, March 16, 2010 10:35 PM
To: Planning Commission
Subject: the City's tree regulations

To whom it may concern:

I would like to see the city of Portland designate certain areas to plant fruit trees between the street & the sidewalk. I realize there would be some mess to clean up after people helped themselves to the ripe fruit and some rotten fruit would be left. Perhaps this project could be undertaken in connection with neighborhood groups who would "adopt" a street to take care of.

Sincerely,
Judith Bentley

3/17/2010

T.5

Hamilton, Joan

From: April Boutillette Brinkman [brinkman_april@yahoo.com]
Sent: Tuesday, March 23, 2010 11:29 AM
To: Planning Commission
Subject: Support of urban tree canopy

City of Portland
Planning Commission
Portland, Oregon

Dear Planning Commission ~

As a property owner in North Portland, I write you to make clear that I support improvement of tree code policy and regulations and the protection of the urban tree canopy. I am also a member of the Audubon Society, and the npGREENWAY and Baltimore Woods coalitions, and I support the proposals of these groups to improve policy and regulations and to protect our urban trees. The cost of trying to replace this natural resource may well be insurmountable. As a property owner and taxpayer it just makes much more sense to protect these resources ~ and to not have to face the billion dollar cost of replacing them, not to mention the human and environmental devastation. Thank you very much for your time in consideration of this email.

Sincerely,

April Boutillette Brinkman,
Attorney at Law

Residential address:
6728 N Richmond Ave.
Portland, OR 97203

Hamilton, Joan

From: Michelle D. Bussard [michelle@friendsofforestpark.org]
 Sent: Tuesday, March 23, 2010 11:30 AM
 To: Planning Commission
 Subject: [User Approved] Tree Code Policy

The Forest Park Conservancy



March 23, 2010

To: Portland Planning Commission
 Fr: Forest Park Conservancy, Michelle Bussard, Executive Director
 Re: Tree Code Policy

As Executive Director of the Forest Park Conservancy, I am urging the Planning Commission to support stronger protections for our urban tree canopy: Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects and improve our quality of life and livability of our city.

It is critical that we protect our existing tree canopy as well as planting new trees. It takes years for a tree to grow and reach its full potential and newly planted trees are highly vulnerable. To be effective, any tree strategy must focus first and foremost on protecting our existing tree canopy.

Please support stronger protections for trees on single, non-dividable, residential lots in non-development situations: The proposed new code calls requires a permit and mitigation (either planting of new trees or payment of a fee that goes toward planting trees elsewhere) for cutting trees over twelve inches in diameter on single family, non dividable lots in non-development situations. These parcels cover more than 25% of our urban landscape. Please support this provision and urge the commissioners to consider lowering the threshold to six inch diameter trees.

It is critical that we all take responsibility for trees: Tree protections should be comprehensive across all land use types and for both development and non development related activities.

Michelle

Michelle D. Bissard, Executive Director

(503) 223-5449 ext. 105

Forest Park Conservancy

Dedicated to protecting and enhancing Forest Park

Day of Stewardship, March 20th

Volunteer by registering now at www.forestparkconservancy.org

Hamilton, Joan

From: Jo Carney [Jo.Carney@pgn.com]
Sent: Tuesday, March 16, 2010 4:31 PM
To: Planning Commission
Cc: Jo Carney
Subject: Feedback on FUTURE OF TREES IN PORTLAND

1. Trees need more space to grow. The concrete structures surrounding tree trunks and roots, hinder their growth. within 25 - 100 year they are pushing up sidewalks, and house foundations. Since the life expectancy of many of our native and ornamental trees can be several hundred years, this should be considered. If left unresolved this leads to health and safety issues.

2. Plant native trees and plan that they will be healthy trees (again a space issue and water issue). If you are requiring trees in parking lots, downtown, shopping malls, etc (which you SHOULD), plan for trees that can be REAL TREES. And make sure you have the growing space and the infrastructure to support them (leaf handling, pruning). I'd love to see douglas fir being planted.

Jo Carney
carneyjo1@gmail.com

3/17/2010

T.8

Hamilton, Joan

From: M'Lou Christ [mnortie@yahoo.com]

Sent: Sunday, March 21, 2010 1:51 PM

To: Planning Commission

Commissioners:

As one who has canopy-envy of a friend in Atlanta, let me urge you to do all you can to recommend ways to strengthen Portland's tree canopy. It's good & it's very valuable, but it's not sufficient and it is vulnerable.

What I've read of the current plan seems a good start, but I have 2 points I'd like to stress:

First, I suggest requiring fees--& enforcing them immediately-- that will cover the cost of replacing any trees of 6" diameter or greater. That should be applied to all trees harmed by vehicle weight, etc. man-caused root damage (to their inevitable death) or felled without permit. Focusing only on really large diameter trees or allowing trees to be replaced with twigs puts us years behind in recovering from the harm someone caused just to ease development or prioritize his/her own view over that of everyone else.

Secondly --though I don't think this topic has been included in the current discussions -- I believe something must be done about the ivy that is taking over a huge amount of the region's trees. I believe public and private property owners must be held responsible for at least cutting it back at the base or several feet up on tree trunks -- consistently -- to prevent them from being strangled. Eradicating it altogether is, of course, the real solution.

Thank you for your consideration of my thoughts.

M'Lou Christ
(love my permitted planting strip Sargeant Cherry)
inner SE Portland

T.9

Hamilton, Joan

From: Cheyne Cumming [cheynec@yahoo.com]
Sent: Saturday, March 20, 2010 7:52 PM
To: Planning Commission
Subject: Urban Tree Canopy

Please do what is right and support the maintenance and the growth of our urban tree canopy in Portland. The benefits of protecting our current canopy and planting new trees to increase the canopy for the future are priceless!! Please help to protect what makes Portland the best place to live: Our Trees.

Cheyne Cumming
630 NE Monroe #6
Portland, OR 97212

Hamilton, Joan

From: gingere@pdx.edu
Sent: Monday, March 22, 2010 3:15 PM
To: Planning Commission
Cc: Jortner, Roberta (Planning)
Subject: Proposed City Wide Tree Project

My name is Virginia (Ginger) Edwards. I live at 6730 North Wilbur Avenue, Portland, Oregon 97217.

I am writing to urge you to move forward on this project. We lost a valued white oak tree this year on our block. The tree was estimated to be between 130-160 years of age. It sat on a property line between two residential lots.

This very big tree provided beauty, wildlife habitat, lots and lots of shade, carbon off-sets and brought character to our neighborhood.

When one of the lots it bordered was up for sale, twenty-five (25) neighbors signed a petition asking the owners to keep the tree. We asked for a chance to talk to the absent property owner, then the developer, to propose how the lot could be developed with the tree. No one would respond to our letters or phone calls. We lost a valued friend in that tree.

I hope this new City Wide Tree Project will help us keep trees in the future. We need the shade, the wildlife habitat and the beauty and character each one brings to our neighborhoods.

Thank you. Sincerely, Ginger Edwards
(503) 312-7135

Hamilton, Joan

From: Dianne Ensign [ensign@lclark.edu]
Sent: Monday, March 22, 2010 11:58 AM
To: Planning Commission
Subject: Please strengthen Revised Tree Code and Policy

Dear Members of the Planning Commission,

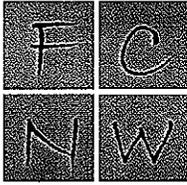
I am very excited to hear that Portland has been working on a revised tree code. The revisions sound good, however, the code could be made even better if it included stronger protections for our existing urban tree canopy. Planting new trees is great, but trees that have already grown and reached their full potential in cleaning our air, providing habitat, mitigating urban stormwater, and their many other benefits, need special protection.

The new code could also be improved if it provided stronger protections for trees on single, non-dividable, residential lots. A permit and mitigation should be required for trees six inches in diameter.

Our urban trees serve many important functions. Tree protections should be comprehensive across all land use types and for both development and non-development activities. Congratulations on the new proposal, and thank you for considering my comments for making it stronger.

Dianne Ensign
11600 SW Lancaster Rd.
Portland, OR 97219

T.12



FISH CONSTRUCTION NW, INC.

2004 HBA Builder of the Year

Portland Planning Commission
March 23, 2010
Testimony from Builder Jeff Fish, Fish Construction NW

Much time has been spent on trying to design a new tree policy for the City of Portland, and City staff have been directed to prepare such a plan and worked faithfully to accomplish a positive end result. However, much is left to question: the need for such a plan, the cost of the plan both to the public and private individuals, and even whether any meaningful results will be obtained by the policy. It is a "solution in need of a problem." It appears people have been "activated" on an issue that really hasn't been clearly defined.

One of the big problems is the hype around misinformation and misconceptions involving trees in Portland. It is often portrayed by neighbors and others in Portland that development and private parties are denuding the city. In fact, BDS finds very few developer violations - few enough they don't even track them (per Michael Lifeld of BDS). Additionally, Rob Crouch of Urban Forestry has provided a spreadsheet that shows there are generally few violations that damage trees to the extent that they need replacement (see attachment).

The Home Builders Association of Metro Portland has provided testimony general in nature that references some of the big picture issues and challenges with the proposed tree plan. I support HBA's testimony, but also have worked to collect additional feedback from several members who build within the City. The following represents various issues that have risen through the various meetings that I and others in the industry have participated in related to the proposed tree policy.

Misinformation and Misperceptions:

1. Comparisons of Tree Canopy to Other Cities

Portland seems to have a tendency to compare itself to other cities selectively, without looking at other factors. It has recently compared its tree canopy to cities like Atlanta, Baltimore, San Antonio, and Austin, Texas. That is like comparing apples to oranges. Baltimore and Austin allow a minimum single family residential zoning of 5,000 square feet. Atlanta has nine different single family zoning classifications, eight of which require a minimum of 7,500 square feet or more. Only their R-4B goes as small as 2,800 square feet and that appears in a very limited area. When you have larger lots, it is quite easy to maintain or plant tree canopy. Put a 1,500 square foot house foot print on a 2,500 square foot lot in Portland and you have 1,000 feet to work with (excluding hard surfaces like walks and driveway).

T.13

Viewed another way, information on the internet via *Wikipedia* shows San Antonio has 3 million residents per the 2008 census estimate spread over 412.07 sq. miles. That results in 3,155 person per sq. mile. Portland on the other hand shows 582,130 population spread over 145.4 sq. miles for a density of 4,004 per square mile. Portland is nearly 27 percent denser than San Antonio (and desiring to increase densities even further).

As was said earlier, comparing Portland to some of these other cities just in measure of tree canopy is using selective viewing. Atlanta, as well as cities in Texas, are areas commonly viewed as having housing sprawl. Measuring tree canopy without looking at how much land is preserved through our UGB system isn't making a fair analysis.

2. Portland's Tree Canopy Report

Portland's tree canopy report was conducted using a few selected random plots of governmental sites. This is far too narrow a site selection to compare Portland's tree canopy to that of other cities. It also doesn't even likely provide an accurate result in determining the true percentage of tree canopy in Portland. We are reacting to unproven information from a random sampling and additionally don't know what the criteria are in comparing the information obtained to other cities information. Random samples were not taken from private sites - the sites that will be most effected by tree policy.

3. Tree Canopy Cycles

Some would believe that we are losing massive amounts of tree canopy. Portland over the years has seen tree canopy come and go. 'Stumptown', Portland's early nickname prior to the 'City of Roses', was due to the amount of trees logged off. A short visit to the Oregon Historical Society will reveal volumes of photos showing the logged areas of what is now downtown Portland, the Hollywood, Eastmoreland, and Laurelhurst districts, Front Avenue, and many other formerly nearly treeless areas.

4. Neighbors Want Increased Tree Canopy

It has been widely promoted that neighborhoods want additional tree canopy. City staff point out that much of inner SE Portland is lacking, in their opinion, tree canopy in areas that have long been completed with housing. Why, if so many neighbors are clamoring for added tree canopy, are they not adding tree canopy in their personal yards? Additionally, if we are going to spend millions of dollars on adding tree canopy, why not assist neighbors by purchasing trees and allowing them to increase the canopy in their existing yards first?

Additionally, not everyone wants additional tree canopy in their yards. Many people enjoy the benefits of additional sunlight in their homes. Besides just the enjoyment of sunlight, additional sunlight helps some people with symptoms of depression, Alzheimer's, and other forms of mental problems. Also certain Asian cultures do not like trees near their homes.

Reality

5. Urban Growth Boundary's and Trade-Off

In 1973, the Oregon Legislature passed Senate Bills 100 and 101 establishing Urban Growth Boundaries (UGB's) and defining the difference between farm and forest lands and urban growth inside incorporated cities. One of the trade-off's recognized in establishing UGB's was that to preserve farm and forest lands we needed to increase density inside the UGB. To

increase density it must be assumed that you will give up such amenities as large lots, greater setbacks between homes, and accept noise and other distractions not common in rural areas. Included in this assumption is that trees will be removed to make infill housing work. Just as you can't raise hogs in your backyard and fire off your shotgun as you would do on the farm, you will have to give up lot size and some trees to make infill housing work.

6. Developers Rarely Violate Tree Removal Restrictions Already in Place

Michael Lifeld of BDS is in charge of investigating zoning violations in connection with the illegal removing of trees on developments under permit. He has stated to me that so few violations occur, they are not formally tracked by BDS. Likewise, Rob Crouch of Urban Forestry notes that there are relative few violations of tree removal or excessive tree damage that results in the loss of trees (see attachment).

7. Employees Needed to Enforce Policy

Tree policy staff estimates that it will take some additional 6 to 8 full time employees (FTE) in the bureau of Developmental Services, Urban Forestry, and Environmental Services to regulate and monitor the new policy. Currently, Urban Forestry is running a full week to 10 days behind (at least of the week of March 8, 2010) to be able to drive out and look at a street tree to determine if it could be trimmed to allow Pacific Power and Light to supply a drop line for power to a single family home. Given the depth of the new policy, I question that only 6-8 full time employees will be able to address the requirements of the new tree policy.

8. View Easements

Unless I missed it, there is nothing addressing 'View Easements' - common easements in Portland to allow homeowners to preserve their views of Mount Hood, Mt. St. Helens, and other mountains and vistas as seen from the Portland West Hills, Mount Tabor, Rocky Butte and other elevations. Most view easements require trees to be topped or removed, not just "thinned". How are these easements, mostly affecting the affluent in Portland, going to interact with the new policy regulations?

9. Loss of Housing Density:

Several factors of the Tree Policy result in possible loss of housing density and housing units committed by the City of Portland to Metro as part of urban capacity and its effect on Urban and Rural Reserves. First, the reduction of density formulas to preserve trees will lead to some loss of housing units by the city. The loss may be fairly small and may be counteracted by increased density allowances. However, density bonuses are usually allowed on higher density zoned developments that are utilizing the maximum coverage of the site. To reduce the lot coverage and add units will be difficult if not nearly impossible. More important is the loss of housing units, should the "in Lieu of" fee be established to purchase conservation easements and or land to preserve trees. This loss of buildable inventory needs to be factored into the Urban and Rural Reserve process so as to be able to provide the housing units of all types as committed by the City of Portland to Metro.

10. Portland's Climate Action Plan 2009

According to the Citywide Tree Policy Review and Regulatory Improvement Project (CTPRRIP) Volume 1, page 15, the current "urban forest removes 88,000 metric tons of carbon dioxide from the atmosphere per year, equal to about one percent of all local emissions." That means that if we move from the current citywide tree canopy of 26% to the total target canopy

of 33% citywide (a 27% percent increase), we may increase our tonnage of carbon dioxide removal from 1% to 1.27%? Wouldn't the money spent on this proposal be better used in cleaning up polluting plants where we get a better return on our money than less than 1/3 of one percent?

Additionally, if you are going to expense the cost of reducing carbon emissions, much of those emissions come from the current homeowner community. Why burden the building community or the purchaser of a new home? If every single Portlander is contributing to carbon emissions then shouldn't there be a tax on every Portlander to recover the expense of the carbon emissions they create, not just penalizing the few?

11. State Land Use Goals

Portland has a propensity to try and micro-manage every detail in land planning and zoning. Usually this leads to expensive and almost unmanageable regulations on affordable housing. I see this headed in the same direction with the tree policy. Trees are great and valuable, but for the most part they cannot simply trump land use policy and zoning regulations. Of the nineteen Oregon Statewide Planning Goals and Guidelines, several include goals that override what decisions may be made by the Citywide Tree Project. Those include Goal 10 (Housing); Goal 13 (Energy conservation); and Goal 14 (Urbanization).

Goal 10 (Housing) requires that there be "varying rent ranges and cost levels"; "allowances for a variety of densities and types of residences in each community", and "housing that meets the housing needs of households of all income levels." Trying to maneuver structures around limited size sites can greatly affect the cost of housing.

Under Goal 14 (Urbanization), Urban Growth Boundaries are established so as to locate our housing and development needs to preserve farm and forest lands, to allow development to occur in specific areas, and to allow that development the freedom in those UGB areas to development. Trying to protect nearly every tree inside approved and previously zoned areas runs counter intuitive to the purpose of establishing the UGB in the first place. Additionally, setting rigid tree guidelines that reduce density will require expansion of the boundary and the removal of more trees than will be saved due to infrastructure requirements like roads, sewers, and utilities added to replace these zoned areas inside the existing boundary lost by excessive tree regulation.

12. Arborists views

Arborists' interpretation of what they find at a project site are quite subjective and those subjective decisions have a great impact on what can be done around a tree or whether a tree should be left onsite. My personal experience over the years in obtaining arborists reports for land development projects has shown there is no science to tree removal or root protection. Sometimes one arborist sees no value in a certain tree while another arborist may feel the tree is worth saving. Making tree protection goals around subjective arborist decisions is bad policy.

13. Solar and Trees

As little as 15% shading on a solar panel effectively makes that panel dysfunctional. Nothing has been addressed as to what the policy's impact may have on solar as solar continues to make greater strides in the market place.

Costs and Accountability

14. Models:

Nothing has been modeled or tracked to determine what the overall costs will be associated with implementation of these policies, costs that will be sufficiently more expensive on smaller sites and on residential housing than commercial or institutional development. Fifteen foot setbacks from neighboring trees at property lines along 25' x 100' lots will have significant impacts on being able to build on narrow lots. Should Portland seriously want to adopt the Tree Policy, they need to spend the time and money to determine what the effects will be to housing affordability.

Additionally, fifteen foot tree preservation areas behind a home on a 25' by 100' lot results in a preservation area of 375 square feet while the same 15' preservation on a 50' x 50' lot doubles the preservation area on the same square footage lot. Neighbors have asked that the development community develop wider lots so as to blend with the neighborhood. This tree policy counter acts that request by neighbors.

15. A Financially Broke Bureau of Development Services and Trees

Over the last year and a half, the Bureau of Developmental Services has lost over \$13,000,000 out of their reserve account and nearly exhausted it completely. As a result, they have had to lay off or transfer out of the Bureau approximately 150 jobs. Where is the money going to come from in establishing this tree policy and meeting the demand that is going to be placed on BDS in this down economy? Putting it on the backs of new housing or existing property owners, especially in this economy, is a bad choice.

16. System Development Charges and Trees

There is a very specific methodology, as established by state law, which provides the mechanism to be able to calculate a specific SDC by the City. By paying into a Tree Preservation Fund to purchase trees for parks, environmental services, water bureau property, or even off site street trees; the city has now potentially established another SDC or modified an existing SDC outside of state regulations. Such a violation will certainly result in litigation to remove that additional SDC expense unless the total 'in lieu of tree fee' is credited back to the permit applicant from the bureau receiving the eventual tree. Imagine the record keeping expense by the city in trying to track and refund the 'in lieu of' fee to a permit holder. In addition, why shouldn't the very SDC funds new housing pays for parks be used to help address the City's tree canopy protection goals, rather than adding even additional costs onto housing?

17. BDS' Development and Review Advisory Committee (DRAC)

DRAC has not had a chance to comment on the Portland Tree Plan. The Plan was presented to DRAC on March 11, 2010. However, because of scheduled visitors already on the agenda, there was no time to comment on the plan. From what was discussed by some members of DRAC after the meeting, there is great concern regarding the proposal.

19. Bonding and Insuring of Trees

Mentioned in the new tree policy is the possible requirement to 'bond' trees on jobsites against damage or destruction. Under the current economic climate, it is nearly impossible to get a

bond for ordinary street improvements, much less to bond a tree. The bonding industry is different than the insurance industry. The bonding industry does not expect statistically for there to be a loss, so when one occurs the bonded party generally will not be able to get a bond renewed or obtain a bond on a new project. Currently, even the misconception that a developer is out of compliance with his bond on a city project can result in the bonding company not issuing a bond for any future project. Bonding is not insurance, it is a surety, and in the context of the Citywide Tree Policy Review bonding is being misused as insurance.

Of all the commodities of value that an individual can insure on his property the one item that is un-insurable are trees. The lack of insurability undermines the value of the tree canopy and its replacement. If it is uninsurable, how does the public arrive at a replacement or value of the tree?

20. Prioritizing Goals

The City of Portland needs to prioritize its regulations impacting increased housing densities, redevelopment and housing affordability. If the ultimate goal is really to have affordable housing and to have housing choices, then regulations that impede the achievement of that goal need to be given a subservient role in the conditioning of permits.

Portland's Tree Policy seems to be on a fast track as "a solution in need of a problem." Since we don't have the money to implement this program, my suggestion is that we take the time to work out the specific details between the city and the development community, refine those details and adopt a workable policy that can be implemented without creating the conflicts that currently exist. Possibly this policy could eventually be something that could be used Metro wide to unify and simplify the existing tree regulations in other jurisdictions inside Metro. I know our industry would appreciate the opportunity to work further with the City to achieve this goal.

Sincerely yours,

Jeffrey Paul Fish, President
Fish Construction NW, Inc.

Date reported	Address	Property type	Reported By	Trees Cut	Summary and Additional Info	Outcome and Mitigation
1/30/2009	217 SE 127th	residential	neighbor	1 douglas fir	New building constructed 3 feet from the tree, causing root damage and subsequent removal.	\$500 fine
2/24/2009	2423 SE Hawthorn	commercial	citizen	1 walnut	Tree cut without permit.	\$750 fine and plant 3 trees
2/25/2009	5302 SE Harold	vacant lot	neighbor	4 douglas firs	Trees cut without permit prior to issuance of building permit to develop the lot.	\$470 fine
5/12/2009	11929 NE Airport Way	commercial	customer	2 cedars	Inspection revealed trees were multistemmed, each stem was < 12".	no mitigation required
7/15/2009	3350 SE Harold Ct	residential	neighbor	1 oak	Tree topped at 20' and will recover.	no mitigation required
12/14/2009	NE Corner of SE 20th and Market	vacant lot and parking lot	neighbor	1 douglas fir, 1 red maple	2 trees cut without permit. Waiting on acceptable mitigation plan.	in process
12/17/2009	7824 SW 37th	residential	neighbor	1 pine	Tree was diseased and damaging retaining wall.	in process
12/21/2009	7541 N. Dwight	residential	citizen	1 oak, 1 douglas fir	Trees cut without permit, waiting on acceptable mitigation plan.	in process

To : Planning Commission and Urban Forestry Commission Members

Date: April 13, 2010 – Testimony March 23, 2010

From ; Scott Fogarty, executive Director Friends of Trees

RE: Friends of Trees Support / Comments on Tree Policy Package Proposal

Thank you for the opportunity to share some thoughts on the consolidated Tree Code and for taking to time to recognize the social and economic values of trees and the very important role they play in our community.

My name is Scott Fogarty and I am ED of FOT and am on the stakeholder committee that reviewed this issue over the last 2.5 yrs. Many of my comments have been made at those meetings but I want to address three main issues tonight. Overall, we do believe that a uniform application of regulations is needed to address multiple issues with regard to trees and overall support the Citywide Tree Project.

Friends of Trees serves a variety of roles in planting and protecting trees including taking a lead on watershed health improvements, recruiting volunteers and sponsors, educating the public about the values of trees and helping to influence tree policy at the local, state and federal levels. Trees are a \$5 billion dollar asset of the City and provide drainage and watershed health ecosystem services, often for a fraction of the cost of providing single-objective grey infrastructure solutions.

Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects, increase the energy efficiency in our buildings, reduce neighborhood crime and improve our quality of life and the livability of our city. Trees play an integral role in the success of many recently adopted city plans and programs including the Portland Watershed Management Plan, The Urban Forestry Plan, Grey to Green Initiative and the Climate Change Action Plan. Yet today protection for our urban trees is inconsistent at best.

Dramatic increases in tree planting efforts over the past decade are undermined by lack of protection and mitigation requirements for trees on much of our landscape, confusing and sometimes contradictory regulations, lack of educational outreach resources and insufficient enforcement capabilities. As older and larger trees are being lost, we are increasingly replacing them with smaller and more columnar trees which provide far fewer ecosystem services. An Urban Forestry Assessment recently completed by Audubon, Metro and PSU shows that Portland is increasingly lagging behind many neighboring communities in its efforts to protect its urban tree canopy. The proposal that is being brought forward this week will create clear, simple, consistent and comprehensive protections for our urban trees.

T. 14

First, we believe that in order to achieve the goals of the city we cannot just plant thousands of trees as we are currently doing, we must also have in place stronger regulations for the preservation of trees. FOT believes that if we are going to shoot for a 33% canopy cover as outlined in the urban forest implementation plan, planting trees alone will not achieve that goal. Not only should we plant trees but also we must preserve and protect, to a reasonable level, and to the best of our ability, all those big, old trees that make up a great percentage of our current cover.

These propositions, preservation and preservation are not mutually exclusive and need very much to compliment one another to reach the canopy goal but also to continue to realize and recognize the many environmental, economic and social values trees provide to us. We applaud the city's efforts to plant more trees but we need more and we need to preserve on sites and not just on streets. The trees I plant today with my young daughters will take 20-30-40 years to achieve the cover we need if we simply plant but don't protect. They, you and I enjoy today the values and benefits of those trees planted by folks before us.

Therefore FOT would support regulation of trees down to 12 inches and does not support a trigger of 20" for regulation on development sites. We feel this would create an inequity in balance of new and old trees and would further encourage the cutting of trees both on private non-development lots as well as on developable lots. This is an inherent conflict that needs to be resolved.

Further, FOT feels the tree density zone %ages as outlined on pg 135 Title 11 fall far short of what is necessary to accomplish the stated canopy coverage goal. They seem very low when looked at in the face of the value trees bring. These numbers seem to overwhelmingly undervalue the community benefits trees provide specifically with regard to lot size. For example, 1 tree per 3,000 – 5,999sq ft on residential lots seems far below stated goals and seems to vastly undervalue trees not just to the residential owner, but the greater community at large.

The price of doing business in a community includes internalizing externalities both positive and negative and looking at the actual value of those community assets brought forth by that business. The current proposal seems to vastly undervalue the positive community externalities related to trees on private property.

The price of retaining and increasing tree density standards is NOT prohibitive or unduly burdensome to infill development or low income development. I wonder what the actual %age of developable lots will even fall under these code changes and if truly there will be a burden to development. It would be nice to see some evidence that it would

Finally, FOT believes regulation and enforcement are necessary to protect the assets of the greater Portland community and that as a LAST resort, mitigation in the general proximity of tree removal is necessary. Mitigation requirements must be structured that the value of the tree removed is taken into consideration and that mitigation funds be directed to a specific, discreet fund to be used to plant trees or to help enforce regulation.

Hamilton, Joan

From: Nikki Kelly [nikstarter@gmail.com]
Sent: Tuesday, March 23, 2010 4:39 PM
To: Planning Commission
Subject: I support the Revised Tree Code and Policy

Hello,

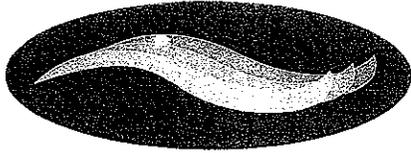
I support the Revised Tree Code and Policy.

- **Please support stronger protections for our urban tree canopy:** Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects and improve our quality of life and livability of our city.
- **It is critical that we protect our existing tree canopy as well as planting new trees.** It takes years for a tree to grow and reach its full potential and newly planted trees are highly vulnerable. To be effective, any tree strategy must focus first and foremost on protecting our existing tree canopy.
- **Please support stronger protections for trees on single, non-dividable, residential lots in non-development situations:** The proposed new code requires a permit and mitigation (either planting of new trees or payment of a fee that goes toward planting trees elsewhere) for cutting trees over twelve inches in diameter on single family, nondividable lots in non-development situations. These parcels cover more than 25% of our urban landscape. Please support this provision and urge the commissioners to consider lowering the threshold to six inch diameter trees.
- **It is critical that we all take responsibility for trees:** Tree protections should be comprehensive across all land use types and for both development and nondevelopment related activities.

With thanks,
Veronica Kelly
1221 NW 11th ave
Portland, OR, 97209
503-720-4616

3/23/2010

T.14



March 18, 2010

Portland Planning Commission and Urban Forestry Commission
1900 SW 4th Ave., Suite 7100
Portland, OR 97201

Re: Citywide Tree Project

Dear Commissioners:

As stewards and advocates of watershed health and restoration, the West Multnomah Soil & Water Conservation District (WMSWCD) spends significant staff and volunteer time, as well as financial resources on projects designed to protect existing tree canopy and plant native trees. We are encouraged by the proposed Citywide Tree Project objectives and new regulatory framework and offer the following comments.

We believe that the new permit system, which will be applied to all land uses and based on tree type, size, and condition, will allow for better protections of existing trees throughout the City. We believe the emphasis during the development process on preserving high-quality, large, and healthy trees over simply the number of trees, as well as protections for trees on property lines and adjacent sites will help ensure that we protect the urban forest canopy.

We recommend the following be considered and added to the proposal:

- Consideration of snags as important bird and wildlife habitat; encouragement for property owners to keep snags that do not pose a safety concern.
- Education and training for the local arborist and landscaping community regarding the new rules.
- Adequate funding for community outreach and program implementation, most importantly enforcement.

On behalf of the Board, I thank you for your hard work on developing the proposal.

Sincerely,

Brian Lightcap,
Chair

March 23, 2010

MAR 23 2010

Tree Project Testimony – Bonny McKnight
Joint Hearing – Planning Commission and Urban Forestry Commission

Members of the Commissions:

I want to express my strong support for the Tree Project proposal before you tonight and urge you to send it forward to Council for further public process.

The Tree Project is many things. I want to point out three major considerations for me.

First, the process by which the proposal was developed is fundamental to the product before you. This is not a project which used an advisory committee to tweak a fairly complete staff proposal and then send it forward. It was just the opposite, and it is a model of how to create good public policy while also building informed advocacy for it.

Tree concerns came from neighborhood interest and effort. Funding for the Tree Project came from community support before Council. A stakeholder Committee was formed from all interests that would be impacted. The Committee was shown the current regulatory status of trees, provided some options for problem solving, invited to develop others, and then worked out solutions generally acceptable to the Committee.

Second, the Tree Project did not intend to provide all the answers but it does focus the discussion. The elements of the Tree Project include staff support but also include responsiveness mechanisms like the 24 hour hot-line and Tree Permits to help the general public and system users understand the many roles trees play in the City.

Finally, the Tree Project moves us to recognize trees as being a unique type of public good – a Green Infrastructure. As we move to that recognition much of the Tree Project work will be done through information, education, and public interaction, not by rule writing and enforcement. The Community Tree Manual is a key element in this educational approach, for school children to developers and builders to homeowners.

The Tree Project proposal before you is the first step in making sure we don't recognize the importance of trees after we begin to see what we have lost – when we are forced to recognize how arrogant we were to believe we could adequately replace lost canopy.

The Tree Project and its inherent recognition of the multiple canopy, watershed, and personal values of trees will allow us to finally deal with trees as Green Infrastructure, an important public asset providing public good, habitat for other living creatures as well as ourselves, and a core element in the enjoyment of living in Portland.

Please pass the Tree Project forward to Council with the strong recommendation that now is the time to recognize the urgency of beginning this new approach to trees and the need to protect and conserve their multiple values for every resident of Portland.

T.14

Hamilton, Joan

From: N. Nash [nana_nash@hotmail.com]
Sent: Saturday, March 20, 2010 6:10 PM
To: Planning Commission
Cc: FOT-Scott Fogarty, Executive Director; -sent reimb check re. scholarship 7-04 FOT-Teri Ruch (Newsletter Publisher)
Subject: I support the revised Tree Code and Policy for the Urban Canopy in Portland
Attachments: image002.jpg; message-footer.txt

Dear Portland Planning Commission: I am a volunteer with Friends of Trees and believe that the tree-canopy in Portland is very important. I also support and believe in what the revised Tree Code and Policy will do, including the new policy which is set to do the following future planning items--for us all:

- **Consolidate all tree code regulations into a single regulatory title---Previously tree protection regulations were scattered throughout the city code titles and were often confusing and inconsistent.**
- **Standardize and strengthens protection and mitigation for trees on private property in both development and non-development situations**
- **Create a 24 hour hotline to allow citizens to get information and report illegal tree cutting**
- **Create a single point of contact within the city for members of the public wanting to get answers for tree related questions**
- **Create a Community Tree Manual to pull together information on the City's tree protection policies, regulations and programs**
- **Enhance the City's tree inspection and enforcement capabilities**

I also have the following important points to make to you, as our Portland Commissioners, to use as facts to convince others and anyone who doesn't know about this in the public arena (which make good planning sense):

- **Please support stronger protections for our urban tree canopy:** Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects and improve our quality of life and livability of our city.
- **It is critical that we protect our existing tree canopy as well as planting new trees.** It takes years for a tree to grow and reach its full potential and newly planted trees are highly vulnerable. To be effective, any tree strategy must focus first and foremost on protecting our existing tree canopy.
- **Please support stronger protections for trees on single, non-dividable, residential lots in non-development situations:** The proposed new code calls requires a permit and mitigation (either planting of new trees or payment of a fee that goes toward planting trees elsewhere) for cutting trees over twelve inches in diameter on single family, non dividable lots in non-development situations. These parcels cover more than 25% of our urban landscape. Please support this provision and urge the commissioners to consider

lowering the threshold to six inch diameter trees.

- **It is critical that we all take responsibility for trees:** Tree protections should be comprehensive across all land use types and for both development and non development related activities.

Also, for your information, here are some clear facts which support what I just wrote above about the necessity of making Portland's Urban Tree Canopy a more happening reality:

- Portland has a target of 33% canopy coverage citywide. Currently Portland is at 26% canopy coverage. (Portland Urban Forestry Management Plan)
- For every dollar invested in tree maintenance, Portlanders receive nearly \$4 in ecosystem and economic benefits (Karps et al 2007)
- Replacement value of Portland trees is estimated at nearly \$5 billion (Karps et al 2007)
- Our urban forest currently removes 88,000 metric tons of carbon dioxide from the atmosphere each year. This equals about 1% of all local carbon emissions (Portland Climate Action Plan)
- Tree canopy cover over homes can reduce air condition costs by 10-15% (Karps et al 2007)
- More than 200 bird species pass through Portland each year. More than 25% of those species are experiencing significant long term declines. Our urban tree canopy provides important habitat to allow many species to traverse our urban landscape.

Please email me with any questions you may have. This is so important to our community, to beautify, it's good for nature, and for Portland economics!

Thank you for listening, and keep doing what you are plan and maintain Portland to be such a wonderful community to live in.

Respectfully,

Nana Nash, M.A.

915-B NE Roselawn Street

Portland, OR 97211

tel. 503-239-6336

email: nana_nash@hotmail.com

Member of Audubon Society of Portland and Friends of Trees (Center Neighborhood Assoc. Tree Planting Coordinator '05)



MAR 23 2010

Home Builders Association
of Metropolitan Portland

March 23, 2010

Portland Planning Commission
City of Portland
1900 SW 4th Ave.
Portland, OR 97201

Re: Testimony on Citywide Tree Policy

Dear Planning Commission Members:

From the earliest days of Stumptown, our region struggled to balance westward migration with the natural landscape. A hundred fifty years later, we strike that balance with an urban growth boundary that directs development away from surrounding farmland onto infill lots. The City's tree policy needs to support this effort.

The Home Builders Association of Metro Portland has appreciated the opportunity to be involved in discussions regarding the City's proposed new Tree Policy. We have encouraged our members, especially those who build and develop within the City, to attend meetings and provide feedback on drafts of the new policy. Most recently, we provided feedback to BDS staff who attended a meeting with over thirty HBA members two weeks ago. However, as the policy is still a work in progress, it is difficult to comment on specifics and we are concerned that this is being proposed for adoption by the Planning Commission without having been reviewed in final form by stakeholders, including Portland's own DRAC.

HBA is also unsure what problem the City is trying to solve that requires such a major overhaul of its Tree Policy. The decision that the tree canopy needs to be increased from 26% to 33% seems somewhat arbitrary and has little consideration of the impact this would have on other City goals and needs. There are certainly plenty of examples of neighborhoods that originally were farmland that now have beautiful tree canopies (Eastmoreland and Laurelhurst as examples), and these were achieved with less regulations than are currently in place. The proposed new policy would require funding new staff positions and expenses at a time when the BDS has had to significantly reduce its staff and budget. All in all, it seems to be a reactionary effort to a problem that isn't really there that will cost the City money and hurt the development it desires to achieve.

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Home Builders Association
of Metropolitan Portland

Beyond the concerns expressed above, it is our position that any proposed tree policy changes, whether now or in the future, need to consider the following factors if they are to work effectively with other City goals.

Tree Policies Must Address City's and Metro's Plan to Increase Housing Density.

The City's proposed new Portland Plan estimates over 120,000 homes can be built through redevelopment of existing lots/parcels. It also anticipates building higher densities on smaller lots. Metro's recent Urban Growth Report states that infill rates must increase from 27% to 40% in order to accommodate the doubling of our region's population over the next 40-50 years.

Infill offers distinct opportunities and challenges. On the one hand, Portland has great infrastructure; water, sewer, and arterial street systems into which new housing can plug directly.

As to trees, however, infill development is challenging. City staff notes that Atlanta has a higher percentage of tree canopy. We're not even sure you can fairly compare a southern city with a higher percentage of deciduous trees to a northwestern city in a very different climate. Beyond that, Atlanta is also frequently noted as having one of the worst sprawl problems. It is developing at densities less than half of Portland's. In other words – there is a trade-off.

Our region has chosen to protect significant rural lands outside our UGB while forcing higher densities and development inside. The hard truth for this process is that Portland's density goals necessitate removing a lot of existing, healthy trees. This is especially true as you move to smaller lot sizes. Some of the proposed regulations would make it extremely difficult to build on a 5,000 square foot lot, and virtually impossible to build on a 2,500 square foot lot in many cases. Yet, this is the kind of density the City envisions. This process will succeed only with a realistic plan to mitigate those losses by preserving as many trees as feasible and building new canopy, but doing so in a way that doesn't further create regulatory and cost issues for builders. **The City must spend more time reviewing the impact its proposed tree policies will have on the very development it seeks to achieve.** Continuing to increase the costs and regulations related to home building will only further drive up the cost of housing, make achieving the City's density goals more difficult, and pit builder against local neighborhood advocates. This is not a good solution for a City that wants to be known as "The City that Works."

Additional Canopy Creation and Preservation Issues

Given the life cycle of any tree, Portland's canopy must be continually replenished. This plan needs to identify public and private spaces where this can occur. Public open



Home Builders Association
of Metropolitan Portland

space must be part of this plan. The City uses its Parks SDC - which each new home supports to the tune of over \$8,000 - for land acquisition and habitat enhancement. This program must include reforestation and should be considered as part of a tree canopy policy.

The staff report describes the relative canopy values of various tree species. A typical, prescriptive code will not achieve such efficiency. Such a code works only where circumstances are generally repeating. Again, by expanding its urban fringe in flat 100-acre chunks, it is easy for Atlanta to apply simple dimensional subdivision criteria. Portland can maximize design efficiency only by allowing flexibility and rewarding substance over process.

Flexibility comes in granting builders relief from setback and lot dimension standards where necessary to preserve existing tree canopy. The extent of this relief should correspond to the extent of the canopy to be preserved. The Parks SDC can also aid the effort to preserve canopy on infill sites. Canopy preserved to an extent greater than a specified goal should entitle a builder credit toward payment of the Parks SDC.

Summary

It would be unfair and inaccurate to characterize our position as being anti-trees or anti-environment. We have been strong supporters of Metro's Nature in Neighborhoods program, have supported park bond measures across the region, and have worked with the City of Portland on various sustainable and green building and development initiatives. Developers and builders recognize the value of trees as part of what makes housing attractive and work to preserve them as much as is feasibly possible. The bottom line is that we believe our region has done a good job at tree canopy protection already, that in order to achieve the City's and Metro's desired infill and redevelopment goals the City can't place more tree-related restrictions, regulations and costs onto building, and that the proposed policies create several challenges and unintended consequences that need much further review before any changes should be considered.

We urge the Planning Commission to not adopt the policies as proposed and at the very least require staff to conduct a much more thorough analysis of how the proposed regulations would impact the City's plans for infill and redevelopment.

Respectfully,



Home Builders Association
of Metropolitan Portland

David Nielsen
Chief Executive Officer

Hamilton, Joan

From: Frodo Okulam [frodookulam@hotmail.com]

Sent: Sunday, March 21, 2010 4:06 PM

To: Planning Commission

Subject: Tree protections

I just want to say I'm in favor of stronger protections for our urban trees! This has been needed for a long time. Several years ago my brother and I had to sell our parents' home, and discovered there was no way to protect our mature fir trees! Fortunately, we were able to find new family who likes trees to buy our house. Portland needs stronger tree protections, for the health of our whole urban ecosystem.

Frodo Okulam
2804 NE 42nd
Portland, OR 97213
frodookulam@hotmail.com

The New Busy is not the old busy. Search, chat and e-mail from your inbox. [Get started.](#)

3/22/2010

T.19

Hamilton, Joan

From: Brian Parks [brianp@spiritone.com]
Sent: Tuesday, March 23, 2010 5:44 PM
To: Planning Commission
Subject: tree code

Hello: Please vote to revise and consolidate the tree code. I have seen big beautiful trees in our neighborhood cut down to extend parking space on private lots and then no one parks there, but the eagles that used to frolic in the tree-tops don't return. Thank you! Brian Parks

Hamilton, Joan

From: Garrett Phillips [garrett.b.phillips@gmail.com]
Sent: Tuesday, March 23, 2010 3:56 PM
To: Planning Commission
Subject: Revised Tree Code and Policy

Dear Planning Commission Members,

I am writing to urge you to support the City Code amendments proposed in Volume 2 of the Citywide Tree Policy Review and Regulatory Improvement Project. Scientific studies have overwhelmingly shown that trees, and more specifically, their canopy, provide environmental services to urban residents that outweigh their planting and maintenance costs by orders of magnitude. The services provided by trees on private property or in public rights of way do not confer their services only upon the property owners that are responsible for them. The City of Portland should ensure through regulation and incentives that trees are protected and that optimal investment is made in the urban forest. I urge you to specifically make recommendation to City Council that would spur investment in and protect trees that grow large canopies or that provide environmental services 12 months out of the year. Thanks very much for your time.

-Garrett Phillips.

3/23/2010

T.21

Hamilton, Joan

From: Tracy J. Prince, Ph.D. [tprince@pdx.edu]
Sent: Wednesday, March 17, 2010 8:34 AM
To: Planning Commission
Subject: comment on Citywide tree project

Attachments: tprince.vcf



tprince.vcf (278 B)

Hello

I would like to comment that we'd like to see more trees in Goose Hollow. The flat parts of our neighborhood (E/W is I-405 to SW 18th and N/S is from Burnside to the low slopes of the West Hills) are barren places, where the overwhelming feeling is of a concrete wasteland. Simply adding more street trees would add a warmth and greenness to a neighborhood that really needs it!

Thanks
Tracy Prince

**Tryon Creek
Watershed Council**

c/o Friends of Tryon Creek SP
11321 SW Terwilliger Blvd.
Portland, OR 97219
Phone: 503-636-4398 x109
Email:tcwc@tryonfriends.org

Coordinator
Sean Tevlin

Citizen Members

Carl Axelsen
Wendel Beachey
Diane Bland
Tom Calabrese
Kevin Duff
Amy Hoffman
Jared Kinnear
Terri Preeg Riggsby, Chair
Jen Seamans
Eric Strecker
Lynda Troutman
Mary Vogel

**Agency and Organization
Members**

Karen Houston
Oregon State Parks
Jennifer Devlin
City of Portland,
Environmental Services
Jonna Papaefthimiou
City of Lake Oswego, Planning
Brian Lightcap
West Multnomah Soil &
Water Conservation District
Stephanie Wagner
Friends of Tryon Creek SP

Astrid Dragoy
City of Portland,
Parks and Recreation

Dan Rohlf
Lewis and Clark Law School
and Friends of Tryon Creek SP

Leonard Gard
Southwest Neighborhoods, Inc.

March 22, 2010

Portland Planning Commission and
Urban Forestry Commission
1900 SW 4th Ave., Suite 7100
Portland, OR 97201



Re: Citywide Tree Project

Dear Commissioners:

As stewards and advocates of watershed health and restoration, the Tryon Creek Watershed Council (TCWC) spends significant volunteer time and resources on projects designed to protect existing tree canopy and plant native trees. We are encouraged by the proposed Citywide Tree Project objectives and new regulatory framework, and offer the following comments.

We believe that the new permit system, which will be applied to all land uses and based on tree size and condition, will allow for better protections of existing trees throughout the City. The Council agrees with the Forestry Commission that emphasis during the development process on preserving high-quality, large, and healthy trees over simply the number of trees, as well as protections for trees on property lines and adjacent sites, will help ensure that we protect the urban forest canopy.

Additionally, we recommend that The Planning Commission add the following elements to further strengthen the proposal:

- Consideration of snags as important bird and wildlife habitat; encouragement for property owners to keep snags that do not pose a safety concern.
- Education and training for the local arborist and landscaping community regarding the new rules.
- Adequate funding for community outreach and program implementation, most importantly enforcement.

Thank you for your hard work on developing the proposal, and for the opportunity to provide input.

Sincerely,

/S/ Terri Preeg Riggsby
Chair, Tryon Creek Watershed Council

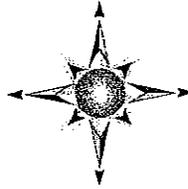
T.23

Bob
Sallinger

MAR 23 2010



COALITION
FOR A
LIVABLE FUTURE



March 23, 2010

Portland Planning Commission
Portland Urban Forestry Commission
1900 SW 4th Ave, Suite 7100
Portland, Oregon 97201

Dear Members of the Planning Commission and the Urban Forestry Commission,

We are writing on behalf of Audubon Society of Portland, Coalition for a Livable Future and the Urban Greenspaces Institute to offer our comments on the Citywide Tree Policy Review and Regulatory Improvement Project. All three of our organizations view a healthy urban tree canopy as a foundational piece of Portland's green infrastructure and an essential element of healthy, livable communities. Audubon has participated in the Citywide tree Project dating back to 2007 when we served on the Bureau of Planning Budget Committee and strongly urged the Planning Bureau and City Council to prioritize funding for this project. Bob Sallinger and Jim Labbe both participated on behalf of Audubon on the Stakeholder Advisory Committee for this project. We commend the Bureau of Planning for their work on this effort and strongly encourage the Planning Commission and Urban Forestry Commission to move forward expeditiously with a recommendation to Portland City Council to adopt and fund this program.

Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects, increase the energy efficiency in our buildings, reduce neighborhood crime and improve our quality of life and the livability of our city. Trees play an integral role in the success of many recently adopted city plans and programs including the Portland Watershed Management Plan, The Urban Forestry Plan, Grey to Green and the Climate Change Action Plan. Yet today protection for our urban trees is inconsistent at best. Dramatic increases in tree planting efforts over the past decade are undermined by lack of protection and mitigation requirements for trees on much of our landscape, confusing and sometimes contradictory regulations, lack of educational outreach resources and insufficient enforcement capabilities. As older and larger trees are being lost, we are increasingly replacing them with smaller and more columnar trees which provide far fewer ecosystem services. An Urban Forestry Assessment recently completed by Audubon, Metro and PSU shows that Portland is increasingly lagging behind many neighboring communities in its

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efforts to protect its urban tree canopy. The proposal that is being brought forward this week will create clear, simple, consistent and comprehensive protections for our urban trees.

We have heard some people question whether the costs associated with this plan would be better spent simply planting more trees. To that question we offer an emphatic "no." Portland has outstanding tree planting efforts conducted by both city bureaus and non-governmental organizations and support for those programs must continue. However, the greatest bang for the buck comes from protecting what we already have in the ground. The estimated replacement value of our urban tree canopy is nearly \$5 billion (Karps et al 2007). Many tree species do not reach their full potential for decades and over time the costs of maintaining a tree are dwarfed by the ecosystem services that mature trees provide. We need to protect and maintain trees just as we do other components of our urban infrastructure. In order to reach the city's canopy target of 33% canopy coverage, we must accelerate our tree planting efforts, but the foundation of Portland's tree canopy strategy must be focused on preservation and stewardship of our existing canopy. We are pleased that the city is working towards the ability to capitalize trees. The logistics of such a change may take time to work out, but from a practical perspective it makes sense to protect and maintain trees just as we do other capital assets.

We have also heard suggestions that protecting trees on the urban landscape will conflict with local and regional density targets. This is simply a specious argument. While the Tree Improvement Project appropriately focuses on preservation of trees as the preferred option, it also clearly gives developers and property owners the opportunity to pay a fee in lieu to mitigate offsite for trees that cannot be preserved onsite. In addition the project calls for significant increases in outreach resources and code modifications to promote innovative site designs that accommodate both development and natural resource protection. Preserving and enhancing neighborhood tree canopy in fact promotes compact urban form by creating livable communities that enjoy access to nature and all of the ecosystem services that trees provide. The City of Portland should consider trees an essential part of the "20 minute neighborhood" that will anchor the Portland Plan that is now under development.

While we are strongly supportive of the Citywide Tree Policy Review and Regulatory Improvement Project in general, we would like to highlight a few areas that we believe merit additional consideration:

1. **Trees in non-development situations:** We could urge the Commissions to consider lowering the regulatory threshold for permitting tree removal in non-development down to six inches rather than the currently proposed 12 inches. We believe the 12" standard (6" for Madrone and White Oak) will allow for the unregulated and unmitigated loss of too many trees and is contrary to the city's objective of preserving and enhancing the urban tree canopy. 19% of the city's canopy currently falls in the 6"-12" range.
2. **Trees in development situations:** We believe that the proposed standards for tree preservation in development situations take a step backwards from the current standards by eliminating the existing "significant tree list" and replacing it with a new "priority tree list" which only includes trees greater than 20" except Oaks and Madrones which are regulated at greater than 6". We would suggest that the Commissions consider defining "priority trees" as any tree greater than 12" and expanding the 6" inch threshold beyond Oaks and Madrone to include several other native species that are either slower growing or which never reach large size. This list would include Bitter Cherry, Black Hawthorn, Cascara, Grand Fir, Pacific Yew, Oregon Ash, Ponderosa Pine, Scouler Willow, Western Flowering Dogwood, Western Hemlock and Western Red Cedar.

3. **Density Standards:** We strongly encourage the Commissions to request that staff take a further look at Tree Density Standards (Page 135 of Volume 2). We believe that the tree density standards were set too low. We believe that in each of the categories listed could easily absorb increased density. For example under the proposed regulations an average 5000 square foot city lot would be required to have a density of only a single tree unit. We would request that staff reconsider whether higher tree densities should be required.
4. **Tree Manual:** We view the Tree Manual as a critical component of this program. The Tree Manual will provide the community with a roadmap of what compliance with this program looks like on the ground and a variety of options for implementation. We urge the City to look to BES' outstanding Stormwater Manual as a template for how the Tree Manual should be developed. We are concerned that while funding costs are included in the draft Tree Program, this element of the program will wind up being cut or dramatically reduced in scope and concept. We do not believe that simply patching existing documents together will suffice. A well written, coherent and comprehensive Tree Manual is integral to the success of this effort
5. **Programmatic Permits:** We are concerned about the level of notice and comment allowed for the programmatic permits. We believe that programmatic permits have the potential to have significant impacts on the urban canopy and that different agencies have demonstrated differing levels of expertise and concern for protecting and preserving trees. We would urge the Commissions to recommend a greater level of public review including an opportunity for appeal and regular reviews of implementation of the permit within the 5-year lifespan.

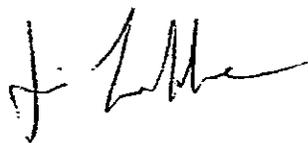
Overall, we believe that the Citywide Tree Policy Review and Regulatory Improvement Project represents a major step forward in the city's efforts to achieve its urban canopy objectives. In addition, adoption is essential for compliance with Metro Title 13. Finally, expansion of our city's green infrastructure to address urban stormwater capacity is essential keep the city's most expensive project, the \$1.4 billion Big Pipe, from becoming overwhelmed as additional impervious surface is developed on our urban landscape. We believe that the costs associated with this proposal, including any additional costs associated with our above recommended amendments, represent smart, strategic and proactive investments in the City's green infrastructure. For every dollar currently invested in tree maintenance, Portlanders receive nearly \$4 in economic and ecosystem benefits (Karps et al 2007).

Between 1972-2002, Portland's urban canopy increased by a total of 1.2%. At this rate it would take another 169 years to add the additional 6.7% necessary to achieve Portland's canopy target of 33% coverage. This proposal set's Portland on a much more ambitious trajectory, one that city policies have repeatedly recognized is necessary to maintain a sustainable and livable urban landscape. We appreciate your consideration of our comments and urge you to move the Citywide Tree Policy Review and Regulatory Improvement Project forward for adoption.

Respectfully,



Bob Sallinger, Conservation Director
Audubon Society of Portland



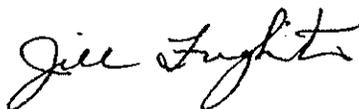
Jim Labbe, Urban Conservationist
Audubon Society of Portland



Mike Houck, Executive Director
Urban Greenspaces Institute



Ron Carley, Co-director
Coalition for a Livable Future



Jill Fuglister, Co-director
Coalition for a Livable Future

Hamilton, Joan

From: Eileen Schill [eileen_schill@hotmail.com]
Sent: Saturday, March 20, 2010 9:27 AM
To: Planning Commission
Subject: Tree canopy protection

Please vote to strengthen and consolidate codes protecting Portland's tree canopy. The loss of large, mature trees is a loss of a very valuable asset and cannot be mitigated by planting smaller trees in their place. If we expect to reach our target of 33% tree canopy, we need stronger codes protecting the existing canopy and encouraging the planting of new trees.

Thank you,
Eileen Schill
NE Portland

im EMAILING FOR THE GREATER GOOD
Join me

T. 25

Hamilton, Joan

From: nancy.seton@usbank.com
Sent: Tuesday, March 23, 2010 3:06 PM
To: Planning Commission
Cc: nancyseton@comcast.net; jim@thayers.org; sgoldfeder@comcast.net; Jortner, Roberta (Planning)
Subject: SWHRL Neighborhood in support of proposed Tree Project

I would like to say that the Southwest Hills Residential League (SWHR) Neighborhood enthusiastically supports the proposed Tree Project in its entirety. We are so gratified that the city is incorporating suggestions for improvement of tree policies from the Southwest Neighborhoods Inc (SWNI) document created several years ago.

Our tree canopy is so essential to the character of the SW Hills, and we need the best tools to protect and enhance it. We strongly support components of the new policy, including:

- Consolidated code title called "Trees"
- 24-hour tree hotline, single point of contact for the public, and Community Tree Manual
- Standardized tree removal permit system; require a permit to remove trees 12 inches in diameter or larger on all lots; eliminate existing single family lot exemption
- Flexible development standards to encourage preserving large trees and groves
- Stronger tree preservation requirements in land use reviews
- New tree preservation and tree density standards applied through building permits
- Improved inspections and enforcement
- Clarified use of City tree funds

We are so grateful for the hard work and dedication of the Tree Project team - Roberta Jortner, Morgan Tracy and all the others. We urge you to support this needed update to Portland's tree policies.

Thank you!
 Nancy Seton
 SWHRL Neighborhood Assn. Land Use Chair, Board Member

Home Tel: 503-224-3840
 nancyseton@comcast.net

U.S. BANCORP made the following annotations

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3/23/2010

T. 26

MAR 23 2010

Testimony before a Joint Session
of the
Urban Forestry Commission
and the
Portland Planning Commission
March 23, 2010
6:00 p.m.
1900 SW 4th – Suite 2500A

Dear Commissioners,

Good evening. I am Dick Shafer, President of the Peninsula Drainage District #2 and have been asked to be spokesperson tonight. With me is Chris Bailey, President of Peninsula Drainage District #1 and Larry Cooper, Past President and current Board Member from the Multnomah County Drainage District. We are elected to our positions on the Boards every three years and the respective board members select a president annually. We work collaboratively under Intergovernmental Agreements. Also here is Dave Hendricks, Deputy Director of the Multnomah County Drainage District. Executive Director Bob Eaton sends his regards but is out of state this evening. I appreciate the opportunity to testify tonight on an issue of importance to the Districts.

The Peninsula Drainage District, and the two affiliated districts, have a 93 year history of protecting some of this city's greatest resources. The Districts are the local sponsor for 35 miles of federal levees and own and maintain ten pump stations with a combined capacity of one million gallons a minute. We also manage and maintain the public conveyance system of sloughs and ditches that move water through and out of the bathtubs created by the levees on the North along the Columbia River and south along Columbia Slough. For MCDD the higher lands are along the south at Columbia Boulevard. (Would a map be useful here?) Approximately 60% of the water handled by MCDD comes from outside the District boundaries but within the Columbia Slough watershed.

The current value of the land protected is around \$20 billion and includes in PEN 1 Heron Lakes Golf Course and Portland International Raceway, the Port's wetlands and Metro's Expo Center; in PEN 2 Delta Park, Portland Meadows Race Track, Columbia Edgewater Golf and Country Club and a 45% residential population; and in MCDD the City of Portland Well Fields, the City's industrial sanctuary, the Portland International Airport, Riverside Golf and Country Club, two Multnomah County Corrections Facilities and the NOAA Weather Service. Also included in these areas are two interstate highways – I-5 and I-205 – and three major east-west roadways in Marine Drive, Airport Way and Columbia Boulevard.

The Districts work with a score of federal, state and local regulatory agencies on managed floodplain issues. We are used as a national example for establishing and managing a drainage district.

T.27

The Districts have been working with City staff on portions of the tree Policy and Regulatory Improvement Project. Much of the policy relates to “development trees” and we will comply with anything that is proposed there. Occasionally the Districts build a new pump station or relocate an old one – in other words a development project – and we need to comply. It is in the area of “non-development trees” that we have been most active.

Each day of the year, District staff is in the natural resource doing routine maintenance. There have been five-year renewable permits secured to do this federal and state-mandated maintenance work without seeking individual permits. An annual report created by the District explains what has been done during the past year and what is planned for the upcoming year. The regulatory staff may come to look at any project at any time. The process is very transparent and has worked well.

The Districts are not in the tree removal business. It would be great if we didn’t have to remove trees, allocate funds for tree removal or work with neighborhoods to remove trees. Our mission is personal and property safety through a highly rated flood-control system. However, when the United States Army Corps of Engineers says a tree violates its national levee vegetation standard and must be removed to keep the levee certification, we must remove the tree. That tree is either a dead, dying or diseased tree, or it is a hazard tree by federal definition. The USACE has overlooked some of these trees in years past, but now, because of the new standards brought about by the levee failure experience in New Orleans during Hurricane Katrina, requires they be removed. The majority of these trees were not planted to be part of the levee landscape. They grew from seeds distributed by the winds or birds and should not have been there in the first place. We have asked City staff to note these federal mandates in the language of the new Chapter 11 and help keep the districts from getting caught between a federal mandate and local regulations.

There are two beneficiaries to our certified levees and conveyance systems. First are the people and businesses who live directly behind the levees. They have access to low cost flood insurance and can receive funding from lending institutions for development or major remodeling. These are significant benefits for having certified levees.

The other beneficiary is the City of Portland whose city flood insurance rates would be adversely impacted by uncertified levees. Protected are the City’s well fields and the industrial sanctuary, the largest in the state in both size and employment. The City naturally expects these will be protected by MCDD.

Here are our specific suggestions for the revised tree ordinance:

- 1) The District’s support the Programmatic Agreement approach which is identified in Chapter 11. However, because we also perform other activities in the environmental resource areas, Chapter 33 would still apply but does not have provisions for a Programmatic Permit approach. We, therefore, recommend a code amendment to Chapter 33 to allow for the Programmatic Permit approach.

- 2) We've heard that some object to the Programmatic Approach because there is no appeal process built into it. If this is an issue, we support an appeal process being put into place.
- 3) Title 11 exempts State and Federal authorities who manage property. Since the levee system is a federal levee system being managed for public safety, and any trees being removed are required to be removed by a federal agency, why wouldn't the District fall into the same category? We recommend inserting the language being offered in the Port of Portland ESEE into Chapter 11.

Thank you for considering our thoughts. We would be happy to answer any questions you might have.

5 minutes 45 seconds

Hamilton, Joan

From: Carol Williams [Carolmailbox@msn.com]
Sent: Sunday, March 21, 2010 1:44 PM
To: Planning Commission
Subject: Tree Policy

To Whom it May Concern:

I am in support of the City Wide Tree Policy for a number of reasons. Just to touch on a few, they help with the pollution in cleaning the air, they provide noise barriers, and they are an asset to beautify our city. There are so many more reasons and I'm sure you have heard them all but if we don't protect our trees we will be the losers in this endeavor. Obviously they can't speak for themselves but they play a major part in keeping our City green and I for one support this Tree Policy. Thank you for your time and consideration.

Carol Williams
503-255-9596
carolmailbox@msn.com

3/22/2010

T.28

**Written Testimony Submitted for PC / UFC hearing on
Citywide Tree Project**

Submitted for 4/13/10 record

	Name	Organization	Date
29	Barnett, Margot		4/1/10
30	Bouillion, Tom	Port of Portland	4/13/10
31	Clark, Matt	Johnson Creek Watershed Council	4/12/10
32	Desmond, Jim	Metro, Sustainability Center	4/12/10
33	Elan, Robert		4/12/10
34	Fish, Jeff	Fish Construction	4/13/10
35	Gibbon, Jon		4/13/10
36	Goldfeder, Simone	Architect LEED AP	4/4/10
37	Loff, John	Riverside Golf and Country Club	4/13/10
38	McAllister, David	City Forester, Portland Parks	4/12/10
39	McKnight, Bonny		4/12/10
40	Quinn, Barbara	Friends of Cathedral Park NA	3/26/10
41	Reese, Alesia	East Portland Parks Coalition	4/6/10
42	Robinson, Linda		4/13/10
43	Stark, Eileen	Second Nature Garden Design	3/25/10
44	Stark, Eileen	Second Nature Garden Design	4/6/10
45	Thayer, Jim	SWHRL	3/23/10 (missed in earlier transmittal)
46	Todd, Judy		3/31/10
47	Van Dyke, Jane	Columbia Slough Watershed Council	4/9/10
48	Vogel, Mary	PlanGreen	4/8/10
49	Weber, Richard		3/28/10
50	Wentworth-Plato, Jim	Emerald Tree	3/24/10

Portland Planning Commission
1900 SW 4th Ave, Suite 7100
Portland, OR 972101-5350

Urban Forestry Commission
1120 SW 4th Ave
Portland, OR 97204

1-Apr-10

RE: Citywide Tree Project-February 2010 Proposed Draft

Commissioners:

Thank you for listening to my comments at your March 23 Joint meeting of the Commissions on the Citywide Tree Code Project. I have been involved in urging the City to revise the tree code since 200 initially as a member of the Southwest Neighborhoods, Inc Tree Committee (a subcommittee of the Land Use Committee). I have continued to participate in the discussions of Urban Forestry policy in the city through service on the Urban Forestry Commission and the Stakeholder Working Group for the Citywide Tree Project.

As I indicated in my testimony I am pleased to see that the current proposal brings forward many of the changes that were requested years ago by the SWNI Tree Committee including: the consolidation of tree codes in one place, creating a single point of contact, a hotline number for weekend tree cutting concerns, creating a code that is consistent, implements policy and is more equitable across property types, development of a Tree manual. The Urban Forestry Program has already taken steps to strengthen and reshape the Tree Liaison Program (now renamed Neighborhood Tree Stewards).

The current proposal is a large document. Staff did an excellent effort of shepherding a diverse group of stakeholders through a lengthy and complex code to flesh out concerns, issues, and practical ways to address concerns. At first glance it hardly seems that the proposal is a simplification of the existing code. However when examined more closely it documents the purpose of the code consolidates code from many areas, and provides more clarity than the existing code.

My interest in urban forestry stems from my environmental health training which recognizes the vital role urban forests play in providing clean air, shade, water filtration, and other human health benefits in addition to habitat, stormwater and carbon sequestration functions. We are increasingly recognizing the infrastructure value of trees. This proposal does have costs attached but these costs are small compared to the costs of not caring for and sustaining this asset. Bearing in mind that at least half of the urban forest canopy is on private property it is important to ensure that we provide resources to address this vital aspect of Portland's livability.

The proposed standardized tree permit system will help provide an opportunity for public education regarding the value of urban trees, simplifies current code, and removes the inequities between how trees

T.29

are regulated on residential properties. Streamlining of the appeals process in the new permitting system is a definite improvement.

The proposal provides clear and objective standards that will allow for development that makes the best use of the building sites, encouraging preservation, but not creating excessive new costs or delays. I particularly appreciate efforts to recognize the value of healthy large trees and groves of trees.

The Tree Technical Manual will help the City adapt quickly to changing scientific information and best management practices while providing clear and detailed information for property owners and developers.

X I do have concerns that the proposal needs some fine-tuning. Despite the efforts of staff to create a streamlined and more coherent code, this proposal is still too complex and hard to wade through.

The requirements for tree replacement of non-street trees, when removal is not associated with development does not have any mechanism for crediting property owners for trees planted prior to tree removal. Property owners may have already planted trees in anticipation of a more mature tree reaching the end of its lifespan, leaving them without sufficient area to plant additional replacement trees.

The \$600 fee in lieu of planting needs to be looked at carefully to make sure it is accurate justified and appropriate to both development and non-development situations. I suggest that the payment might be reduced in non-development situations since removal in these situations is not linked with an increase in impervious surface. In these economic times additional costs need to be well documented.

The proposed system does allow for waivers and it is hoped that a system will be developed that prevents the permitting\replacement requirements from being overly burdensome to lower income residents.

There might be some cost savings available if the simplest permits have an option for online processing, allowing submittal of pictures by the applicant.

I am conflicted regarding the trigger size of 12 inches. Slower growing long-lived trees take many years to reach that size. I certainly would not support a 20-inch trigger.

I appreciate the requirement for replacement trees when the removal of nuisance trees results in an environmental zone that is vulnerable to erosion and degradation.

The ecosystem value of larger mature trees is much higher than a younger and or smaller species of tree. The Bureau of Development Services' current data system has not easy way to provide information regarding tree violations, for the public to even know if there is a tree plan that exists for their property and requires certain trees to be protected. The lack of clarity in the current system makes it difficult for property owners and neighbors to know if trees are being cut legally or in violation of code. It also precludes anyone from providing a quantifiable description of violations under the current system. I have observed the impacts of tree cutting both as part of development and non-development situation on erosion of the roadway, and neighbors' properties in my own neighborhood.

The programmatic permit system makes sense, as long as a provision for appeal is put in for situations that meet a certain threshold of number of trees to be cut in a particular project. This is of particular

concern when looking at the potential large scale cutting of trees by entities such as the Port of Portland, and Drainage Districts and City Bureaus.

Portland faces many challenges. I firmly supporting a compact urban form, using infill while doing our best to preserve and enhance the green infrastructure of the region both within and outside of the urban growth boundary. Shade, clean air, and greenery are elements of livability that should be distributed equitably across housing types. As we move forward with the Portland Plan we will need to find creative ways to balance the needs for density, other forms of green infrastructure (green streets, swales, etc.) and solar access with the need to support a diverse urban forest across a variety of urban land uses.

I will most likely be submitted additional comments and/or testimony as you continue to examine this proposal. I urge you to help this proposal move forward while providing guidance in honing it to meet the needs of the city and it's citizens. It will be critical to find a balance to address costs, provide flexibility while addressing many different site situations, and ensure funding and implementation of this plan. The current proposal provides a great deal of flexibility to address trees during the development process. Portland is becoming a more mature city with most building being redevelopment and infill. As such it is important that we be forward thinking and find ways to encourage the stewardship and growth of our urban forest on properties that are already developed in addition to preserving trees during the development processes.

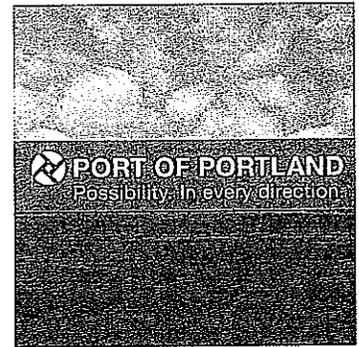
Thank you for your careful consideration of this code improvement and implementation strategy.

Sincerely,

Margot Barnett
9912 SW 25th Ave
Portland, OR 97219

cc: Roberta Jortner, BPS

Mission: To enhance the region's economy and quality of life by providing efficient cargo and air passenger access to national and global markets.



April 13, 2010

Portland Planning Commission
Portland Urban Forestry Commission

RE: Citywide Tree Project-February 2010 Proposed Draft

Dear Members of the Portland Planning and Urban Forestry Commissions:

Thank you for the opportunity to comment on the Citywide Tree Project-February 2010 Proposed Draft. The Port of Portland (the Port) actively supports tree planting and tree preservation on our property within the City of Portland. In addition, the Port has financially contributed toward tree planting performed by other organizations, including Friends of Trees and the Bureau of Environmental Services Revegetation Program.

While the Port has been and continues to be supportive of tree planting and preservation in Portland, we have a number of preliminary questions and comments related to the Citywide Tree Project:

- As noted by the Bureau of Development Services, at more than 500 pages of text, the February 2010 Draft is overly complex and will be very difficult for users, both City staff and the general public, to understand and implement. As a result, we urge you to direct staff to return with a substantially simplified proposal. In addition, we urge you to hold at least one additional hearing in order to take additional testimony prior to making a recommendation to City Council.
- While a programmatic permit approach sounds promising, it is unclear what mitigation or other obligations might stem from such an approach. What will the fiscal and operational impacts be to the Port, city bureaus such as Maintenance and Transportation, and public utilities as they undertake routine pruning and removal of trees?
- Requiring a 15% tree density standard on industrial sites would further diminish the already inadequate industrial land supply in the City of Portland. IG2 zones and IH zones currently require no minimum landscaped area. Over time, a lack of industrial land will force businesses to locate outside of Portland, likely increasing greenhouse gas emissions and further reducing the City's fragile economic base.
- While the proposed code language acknowledges federal requirements related to trees growing near and on flood control levees, it does not acknowledge federal and state requirements related to trees growing into the flight path (airport surfaces) around Portland International

Box 3529 Portland OR 97208

503 944 7000

♻️ Printed on 100% recycled stock

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Airport (PDX). Specifically, the Federal Aviation Administration (FAA) regulates trees around airports under its Part 77 (protected surfaces) and Part 139 (wildlife hazard) requirements. In addition, the State Airport Planning Rule (OAR 660-013-0010) directs cities to prohibit trees from growing into airport surfaces. As a result, the proposed code language should be amended to reflect these federal and state requirements.

- Proposed code language suggests that the property owner as well as a party cutting or pruning trees without a permit would be in violation and subject to City penalties. This situation may be a problem for the Port and other property owners who have a power line or other utility easement across their property, when the easement specifically allows the utility to clear vegetation, including trees. These easement holders, including the Bonneville Power Administration (BPA), a federal agency, may not feel compelled to obtain a programmatic tree cutting permit from the City, since it may be considered a nonconforming or "grandfathered" activity. In other words, the Port does not want to be held responsible for actions taken by easement holders on Port property, since the Port must legally respect the rights of the easement holder.
- The interface between proposed Title 11 and Title 33 is not totally clear. While staff has stated that one or the other, but not both would apply, the draft language does not convey that concept in all cases.

Thank you for the opportunity to comment on the Citywide Tree Project-February 2010 Proposed Draft. We look forward to working with you and staff to further refine this product in the coming months.

Sincerely,



Tom Bouillion, AICP
Planning Manager, Marine & Industrial Development
Port of Portland

Johnson Creek Watershed Council

1900 SE Milport Rd, Suite B • Milwaukie, OR 97222
ph: (503) 652-7477 • fx: (503) 652-7188
info@jcw.org • www.jcw.org

April 12, 2010

Portland Planning Commission
Portland Urban Forestry Commission
1900 SW 4th Ave, Suite 7100
Portland, Oregon 97201

Re: Comments on Portland Tree Policy Review and Regulatory Improvement Project

Dear Members of the Planning Commission and the Urban Forestry Commission,

The Johnson Creek Watershed Council concurs with the comments submitted by Audubon Society of Portland, Coalition for a Livable Future and Urban Greenspaces Institute regarding the Portland Tree Policy Review and Regulatory Improvement Project. In addition, we wish to express our support for several proposed amendments to Portland tree policy as outlined below:

- Proposal to delete the allowance in Zoning Code chapter 33.537, Johnson Creek Plan District for removing trees within Johnson Creek below the ordinary high water level. The proposed change would mean this activity would be subject to the e-zone regulations in Chapter 33.430.
- Proposal to apply tree removal and replacement standards to the outer 25 feet of environmental zones citywide (what are known as transition areas). Currently the tree standards do not apply so all trees can be removed with no replacement. See 33.430.140, page 67 of Title 33 amendments.
- Proposal to change the definition of "Identified Wetlands, Identified Streams, Identified Waterbodies" to include resources identified on the resource inventory map, or in the resource inventory text. This change recognizes that the mapping in most of the resource inventories was coarse and often incomplete and did not include all important water resources. It is intended to provide more consistent protection of water resources and riparian vegetation in existing e-zones (see 33.910, page 249 of Title 33 amendments).

Every year, the Council and its volunteers plant thousands of trees along Johnson Creek and its tributaries to provide shade, erosion control and future large woody debris recruitment. The proposed amendments are necessary to protect our investment in the long-term health of the creek. Like Audubon, UGI and CLF, we believe that recent dramatic increases in tree planting will only be truly effective when coupled with concurrent protection and mitigation of older and larger trees across the entire landscape. This proposal will do that.

In closing, the Johnson Creek Watershed Council applauds the Bureau of Planning for their work on this effort. The proposal will create clear, consistent and comprehensive protections for our urban trees. We strongly encourage the Planning Commission and Urban Forestry Commission to recommend to Portland City Council to adopt and fund this program.

Sincerely,



Matt Clark
Executive Director

T.31



Metro | *People places. Open spaces.*

April 12, 2010

City of Portland Planning Commission
1900 SW 4th Avenue
7th Floor, Suite 7100
Portland, OR 97201-5380

Dear City of Portland Planning Commission:

I am writing to you to express Metro's support for the Citywide Tree Project as proposed by the Bureau of Planning and Sustainability. As you know, Metro acquires natural areas to safeguard water quality, protect and restore fish and wildlife habitat, and also to develop regional parks and trails. Updating and clarifying existing tree regulations will better help us manage these public lands for future generations.

There are two elements of concern for managing the natural areas that we would like to raise for your consideration. The first involves the city's lack of a master planning process that would allow Metro to seek a 10-20 year approval for management activities that currently require individual reviews. The second involves the existing Natural Resource Management Plan (NRMP) process and how out-of-date and burdensome it has become.

Master Plans. The city does have a master plan land use review process, but it is applied only to institutional campuses such as hospitals and colleges. As we understand it, the master plan for these uses allows future projects to be reviewed at one time, and pre-approved for up to 10 years. Changes to the master plan are allowed and reviewed by the city based on the significance of the change. There is no similar process for natural resource areas, yet the management of large land areas for habitat and people require levels of analysis and review similar to those applied to campuses. The natural areas that Metro manages/co-manages with jurisdictional partners involve habitat restoration, management for fire hazard, trail development, and the like.

In our work with the Bureau of Planning and Sustainability on past planning projects we have often discussed this lack of available process and the concept of a new type of land use review master plan for natural resource management. We would suggest that this is a good time to introduce such a concept.

Natural Resource Management Plans. Metro currently manages the Smith and Bybee Wetlands Natural Area, which has an NRMP. Speaking from experience, this document type has severe limitations. The Smith/Bybee NRMP was adopted by Portland City Council in 1990, and since then it has not changed. To contrast, Chapter 33.430, the environmental zoning code has changed over 18 times since 1990. Many of the Smith/Bybee projects identified in the NRMP would be allowed outright, or through a simplified permit process if we were allowed to use the existing environmental zoning code. The key problem is that the NRMP is the regulatory framework for the management area, so unless it is updated the changing regulations cannot be applied to the management area. Because a legislative process, costly and time-consuming, is required to make changes, none has been made. We need to move to a different type of document.

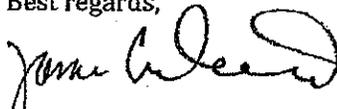
T.32

As you may know, since the environmental zoning rules were adopted (1991), the simplified permit process has been added (1995), and some resource enhancement and trail projects have been deemed exempt from the regulations altogether (2005). Unfortunately, the NRMPs in the city (Smith/Bybee, Forest Park, and Pen 1) are not able to benefit from the modified regulations and are basically stuck in time.

From the title, one would think the NRMP provides a solution to the issue of master planning for an area. This is not so – since the NRMP is a legislative process, it must be approved by both the Planning Commission and City Council and because of this is almost impossible to update. The master plan that we desire is a land use review (quasi-judicial) and would be initiated by the land manager(s) and approved either by planning staff or the hearings officer. Changes to a master plan would also be subject to staff review, but the purpose of the master plan is to provide a living document that can be updated periodically. Long-term management of natural areas requires some flexibility to allow for changes along the way – our understanding of ecosystems is constantly evolving and we need to be limber in order to provide the best practices to these important systems.

To close, we urge your support of the new Title 11, Trees, and revisions to all City Titles, including Title 33, with an additional change to include a master plan process for natural area management.

Best regards,



Jim Desmond, Director
Sustainability Center

cc: Zari Santner, Portland Parks and Recreation
Dave McAllister, Portland Parks and Recreation

Hamilton, Joan

From: Robert [r_elan@yahoo.com]
Sent: Monday, April 12, 2010 3:23 PM
To: Planning Commission
Cc: Jortner, Roberta (Planning)
Subject: Tree Project

Greetings,

I'm very pleased to see that progress is being made to protect and improve the urban forest. I want to mention a few of my concerns about current policies and practices. Some of them may already be addressed in your Action Plan.

-Preservation:

Currently, when someone purchases a home and a large, healthy tree on the lot is perceived as "a danger" or "a mess" they may cut it down. It is true that sometimes a tree in decline is a danger but sometimes the fear is irrational and the decision impacts many others in the neighborhood. That a tree sheds leaves should not be reason enough to eliminate it.

I have also noticed that when developers plan they often want a clean slate. Existing trees are not seen or are viewed as a nuisance to heavy equipment. They are an afterthought. I would like to see the city encourage creative development that includes preserving and integrating existing trees into new developments.

-Tree Care:

Very often I see trees mangled and topped. Urban Forestry has some great pamphlets on tree planting, pruning and care. There's a lot that could change with just a little information. Maybe nurseries and growers could be asked to hand out a simple list of things to do and not to do when planting or caring for a tree. I understand that a major reason for tree failure is simply planting trees too deeply or topping them or spraying too much "weed and feed" around them. Sometimes it's just a matter of putting out some basic information.

-New Rules:

Often homeowners are not the ones that cut down trees and they assume that professionals know the rules. Perhaps service providers should be required to ask homeowners if they have permits before removing trees.

-Enforcement:

I've seen commercial developments in NE where a mix of trees was required. But after a few months the conifers were all removed, presumably to increase visibility of signage? Whatever the reason, there is no reason to go through all the planning if the developer is going to undermine the requirements with no consequences.

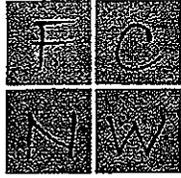
Again, I'm pleased to see attention given to tree preservation.
Thank you! Robert E.

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4/12/2010

T.33



FISH CONSTRUCTION NW, INC.

2004 HBA Builder of the Year

Portland Planning and Urban Forestry Commissions
April 13, 2010
Testimony from Builder Jeff Fish, Fish Construction NW, Inc.

Tree policy as you are aware of is a very emotional issue. To make rational decisions facts must be considered and not hearsay, law must prevail over emotions, and logic must be considered not irrational thinking.

The facts are that Portland, Oregon is a city of some 537,081 individuals as posted on the U.S. Census Bureau site, as of this date. You see testimony of maybe less than 100 individuals regarding tree policy. That means that the majority of the population is content with the current tree policy otherwise they would be down testifying in front of your commissions or marching in the streets as we have recently see regarding police policy. We should not let the emotions of a few individuals dictate what is acceptable by the majority of the population. We complain that only about 60% of the population shows up to vote in our elections in a good year, yet we think we must do something about trees when it only concerns .00002 of our population? That does not make sense.

Additional facts are that we had tree removal or extensive cutting of trees to the extent of 14 trees as reported by the Urban Forestry Division over about the last 14 months with some of those possibly legitimate actions done without the first approving of a permit. This is a far cry from an epidemic as portrayed by some individuals. That means at minimum, approximately one out of every 38,357 citizens violates Portland's current tree policy. Again this is not an epidemic.

This issue is about change. People as a whole do not like change. We expect to arrive home from work, school, a vacation, or any other situation that takes us away from our home to find things as when we left. We are shocked to find the neighbor painting his home a different color or changing the color of his roof, but the real world changes all the time. We fail to remember that the Washington Park Rose Gardens, the gardens and roses at Peninsular Park, the Chinese Gardens and other locations that once were not as beautiful as they are today. How many remember the old *Portland Journal* building and Harbor Drive of the 1950's that now is what we know and love as Waterfront Park. The bigger question is "Would Waterfront Park be more useful to the public and the downtown core if it had never been cut down, been left a strip of Douglas fir trees and natural vegetation?" No, it is by far more useful to the public with the planting, spacing, sizing, and coloring of the trees that were planted there the last 50 years.

The other issue of changed is the part of the public to often assume too much. Constantly some in the public assumes that if there is a vacant lot in a neighborhood, maybe even the buildable side yard of a neighbor's home is always going to remain a beautiful groomed side yard or garden spot. Again, being naïve of the fact the neighbor owns more than the lot his home sets on does not automatically 'grandfather' it in as the neighbor's personal park or view corridor. People need to realize that nearly, if not everyone, in Portland that resides in a home whether in Lents, Laurelhurst, Alameda, Brooklyn, or other neighborhoods live in a home that had trees cut down to construct their

T.34

home. View pictures of downtown Portland in the 1800's or Laurelhurst and Alameda of the early 1900's and there are remarkably few trees. Trees in many of those neighborhoods enhance the homes probably to greater and better extent than if there had been existing trees on the sites when the homes were originally built.

As a residential developer, there are many considerations in building a home on a property, not the least of them are trees. As mentioned in earlier testimony trees do have an economic value on a property's value. But it is not the only value that has to come into a decision. First, the average full grown tree like a maple or Douglas fir is going to cost \$1,000 to \$1,500 to remove, minimum. Most builders will avoid that cost and position their home around the tree if it is functionally possible. They have just saved at least \$1,000 in expense and have preserved some intricate value to their betterment in the sale of the home. But in positioning a home on a site there are other factors that come into play. Nearly all Portland streets have overhead power lines. Often there are guy wires that affect which side of the lot you will need to place your driveway and it is not as simple as telling the electric utility to move the guy wires. Some years ago I had a situation on NE 34th Avenue where the guy wire in the right of way in front of my home supported a pole anchoring 11 poles from my property south over Killingsworth Avenue for nearly 2 blocks. Pacific Power and Light wanted many thousands of dollars to change the guying system (I don't remember the exact amount) and that type of fee reimbursements are written into Public Utility Commission rate filings. It is not as simple as asking them to move the guy wire for a tree. As a result of that situation I could only place my driveway on one side of the lot affecting the location of the home and any decision concerning trees.

Other factors come into play also. Often neighbors' homes across and down the street a home or two, might be unsightly. A purchaser will not desire to purchase the new home if they have to look at the unsightly home. Flipping the layout of the home on the site to use a wall projection to block that unsightly view is a common decision a builder makes in orientation of the home to make it saleable. Should that need to be done it may make removing a tree a requirement. Again, saving the tree is important in the cost savings of building the home but a tree, especially one like a large fir that does nothing to block the unsightly view is useless if the home can not be marketed. Yes, if the unsightly home has nuisance items that the city can help correct that is great; but unsightly disrepair, awful paint colors, or other factors sometimes are not solvable by city bureaus.

Size matters also. Many of the sites we build on are 2,500 square feet or less. If the site is 25' x 100', that gives the builder a very narrow footprint of 15 feet to build within, with no options to move the home. Tree preservation reaching over the property line, up to 15 feet on to the property, will greatly influence that footprint. The situation is made even worse on a 50' x 50' or less lot. On a site of that size there is nearly always less than 6 to 7 feet in the backyard and 5 feet on the side yards. Tree preservation in such a case is nearly impossible.

Speaking to law and logic, Governor Tom McCall and others pushed for Senate Bill 100 and other similar bills in the 1970's to preserve farm and forest lands and to form an Urban Growth Boundary (UGB) with the intent to focus urban development into that UGB's. Logically, if we preserve farm and forest lands but also allow logging in certain parts of those preserved lands, doesn't it logically mean that if we are forcing development into UGB's that there is the assumption of increased density that we will need to remove some trees to make that density work? You can't argue that if we preserve forest land yet allow logging in certain locations that the tradeoff of urban density can not allow required tree removal to construct those densified cities.

Our Comprehensive Plan and Zoning Laws are based on utilizing the different zoning regulations to develop the city to a previously publicly agreed to standard as intended. To allow tree policy to trump those decisions without taking into consideration the major decisions made on Comprehensive Planning is a mistake and undermines the intent of Comprehensive Planning. Better to take the time

to work with BDS and other bureaus to see how these regulations influence residential construction and to develop tree policy as part of the Portland Plan.

Many trees may not be best preserved for the site. Mr. John Gibbons testified in the March 23, 2010 hearing that he had spent approximately \$20,000 dealing with trees left by his developer that were not appropriate for the site and for the relationship to his home. Saving a tree that needs to be trimmed to the extent that it is off balance because you need to work a home around it creates a dangerous situation. Like wise, trying to save a Douglas fir, a tree with limited root structure, next to a home may well be a dangerous situation also.

The Bureau of Environmental Services does favor the drafted tree policy to enhance the control and cleansing of storm water. However, nearly all new construction on the east side of Portland takes the water from the roof of the structure and deposits that runoff water directly into a soakage trench or drywell. For the most part new construction greatly reduces the water runoff from the site without the use of trees over the previously undeveloped site, especially if there were a limited number of trees on the site. Maybe tree policy should be classified by the soils under the trees; essentially the eastside of Portland where most of our housing density is developed being less restricted, and the west side where we have hill sides, more clay type soils, landslide potential, and other risk factors having some greater restrictions.

The bottom line is that there is not the wanton destruction of trees in Portland as some will claim, that current policy works, and that the new tree policy is too large and complex for the Bureau of Development Service to manage. Better if we are to spend nearly two million dollars to purchase trees and let the general public add more trees to their yard if they desire.

Sincerely yours,

Jeffrey Paul Fish, President
Fish Construction NW, Inc.

Testimony Re Proposed Adoption of Title 11 – Tree Code

John Gibbon 9822 SW Quail Post Rd. worked on the SWNI Tree white paper and supports adoption of the tree code as proposed because it creates equity by requiring every property owner to participate in maintaining and improving Portland's tree canopy. Professionally works as an attorney mostly advising people who live in condominiums and home owners associations as to their rights and responsibilities in these community associations.

Support for a Tree Code is entirely based on living in a neighborhood where by CC & R requirement (and some form of City land use approval) native trees are "protected". This is now done by the HOA on an ad hoc basis non-expert basis with some scofflaws and the apparent possibility of all owners being subject to the costs of potential violations of the uncertain current tree regulations. The HOA (and the City) would benefit from the proposed simpler, more transparent and definitive code because it could easily rely on compliance with the City code as compliance with the CC & Rs.

As a something of a "Housing Professional" and a long time participant in and observer of Oregon's land use system believes it is absolutely true that, as the PMHBA has contended that the tree code as proposed will on some level be biased against the type of denser new development which apparently has the most acceptance in the market, particularly townhome style housing. This is particularly true if the standards adopted in Title 11 are treated and used as "clear and objective" standards for land use purposes. However if the city is willing to accept a some reduction in the of this type of housing, along with more expensive and probably smaller single family housing and an increase in new multi-story multi-family structures in residential neighborhoods where significant development occurs it can probably gain the apparent environmental well the arguable aesthetic and "livability" benefits this proposal offers.

The proposal as presented does however offer the home building and remodeling industry the "benefit" of subjecting all its members to the same type of regulation where now it is new land dividers who are bearing the burden of the City's regulation. Supports making this change because it is not only "fair" in this sense to all members of the industry but beneficial to the public and the City in the sense that retention of larger trees on more sites will have on both personal and public storm water systems as well as possible energy "benefits". In dealing with this industry however believes that it would be entirely appropriate for the City to, after quantifying the benefits that trees provide, to adjust portions of the SDCs now charged to the developers and builders to reflect these benefits.

Believes that this proposed new Title 11 is the right first step in recognizing the City's responsibility to fully require all its citizens to reasonably participate in the stewardship of a dynamic natural resource that provides manifestly benefits all members of the community. Based on tree experience to date believes, at least in areas where more dense development has occurred, that the current City hodge-podge of policies related to trees is materially unfair to those individuals who are concerned and active in maintaining this resource, it is time for the city to act get those citizens either benefit from a free ride on their neighbors trees or either somnambulate or at best reactive in dealing with their own.

T.35

4 April 2010

City of Portland Tree Policy
Planning Commission

To whom it may concern,

This letter is a follow up to the verbal comments I had made at the Planning Commission Hearing on 23 March 2010.

My name is Simone Goldfeder and I live at 2975 SW Upper Drive. In addition to being actively involved with my local Neighborhood Association, SWHRL, as a both a board member and Land Use member. I am also an active participant in the Citywide Land Use Group.

I am also a licensed Architect and co-owner of an architectural practice in the City of Portland.

I strongly support the proposed Tree Guidelines. Prior testimony has clearly described the numerous economic, environmental, habitat and qualitative benefits that trees and an urban canopy provide. I will direct my comments to a few additional issues.

Trees & Site Design

The proposed tree policy guidelines have been carefully developed, with ongoing dialogue and outreach to all stakeholders. The proposal is carefully balanced to integrate development with the preservation and planting of trees. The proposal allows many options and possibilities for how one can plan and approach a site-using a more flexible performance based approach vs. a prescriptive approach. If the goal is to balance development with a healthy tree canopy, then this can be shown to be done through allowing flexibility in setback, height, and lot coverage requirements.

Clean air, natural light and trees / vegetation should be looked at as "materials" that one should consider and integrate into the design, approach and building of every site, no different than sustainability, water, sewer, paved areas, building codes, planning codes and structures. These are not abstract qualities, but integral to supporting a healthy, green environment and site sensitive design approach to any project, regardless of its size, scale or use. The site - with its existing characteristics, whether topography, trees, solar access, adjacent context, should inform, mold and generate the design and building. All sites / places are unique and particular and will require a thoughtful approach.

It is not possible to anticipate every potential design variation for every type of site, as there will always be different and unique situations. It is important that the City analyze as many potential options as possible and if the new guidelines are implemented, carefully track and review the implementation over time. This could be done through a performance verification and revisions considered similar to recent reports like the Land Division Study and Infill Report that were issued by the City.

Just as the form and cover of the urban canopy changes - as trees are planted, grow and die - our city's built and natural form evolves as well. The City of Portland strongly advocates an environmental approach, a green and sustainable policy. The proposed tree policy does not limit a developer or property's owner right to develop; it only requires that we all must consider trees as an important and additional variable integrated into the design, instead of ignored or clear cut to accommodate a cookie-cutter / template / flat desertland approach to all sites.

Equity

If one looks at an existing plan of the City of Portland and the current canopy cover, it is clear that much of the canopy is located in the more affluent areas of the cities. Much of the canopy loss in the last 5, 10, 20 years from development within the City of Portland has occurred in East Portland, North Portland and other poorer areas of the City. These parts of the City, in particular, have few if no regulations protecting trees. For example, many of the existing environmental zones are currently located and mapped in areas of Portland with steep slopes and streams. These are primarily areas in the southwest, northwest and some portions of the southeast. Even these zones are inadequate, they provide some minimal portions of sites within resource areas. In most of other areas of the City, there are no protections, especially in economically less affluent areas of the City.

Street trees and trees on private property located in side front and back yards are the "pocket parks" for many residents who have limited or no access to city parks, at any scale. The loss of this vegetation greatly impacts the form, identity and value of these neighborhoods.

The City of Portland is rapidly losing an important piece of its heritage and identity. The proposed tree policy is an opportunity, for the City of Portland, to implement a strategy / policy / codes on the ground that will support many of the lofty sustainable and green goals that are advocated 'in the air'.

Thanks for your consideration.

Best regards,
Simone Goldfeder, Architect LEED AP
2975 SW Upper Drive, Portland OR

T.34

April 13, 2010

Portland Planning Commission
Portland Urban Forestry Commission

SUBJECT: Citywide Tree Project - February 2010 Proposed Draft

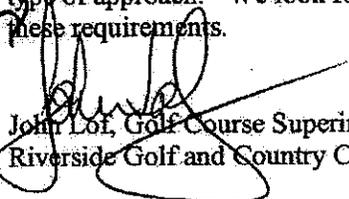
I am John Lof, Green's Superintendent of Riverside Golf and Country Club. I am writing to you on behalf of a coalition of four Airport area golf courses (Broadmoor, Columbia Edgewater, Colwood and Riverside). We have had the opportunity to meet with project staff and wanted to offer a few comments. We appreciate the explanations and ideas provided by staff.

By way of background, I will use Riverside as an example meant to be representative of typical golf course issues in this area. Riverside is comprised of 160 acres and has an estimated 1000 trees. The fundamental use of the course requires that we employ skilled staff to steward these resources for the enjoyment of our customers. We are all proud of the work we do with trees and the many other plants we manage.

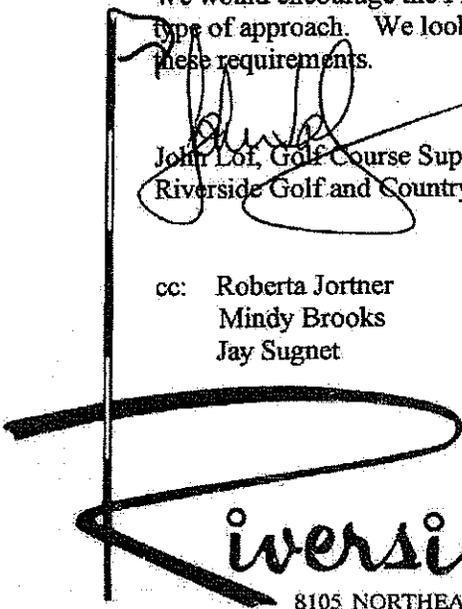
In our discussions with staff we agreed with the overall goals of the program and discussed different ways we could achieve these results. We also discussed with them the Airport Futures process of implementing updated environmental zones, especially as it relates to our coalition. There are extensive proposed revisions to the environmental code that affect large areas of our courses. Ultimately, there may be a way to address both initiatives in an integrated fashion.

Specifically, related to current revisions to the Tree Ordinances, the draft envisions a Programmatic Permit for governments and utilities in Chapter 11.300.070. We believe such a similar mechanism might be appropriate for our situation. Our initial conversations with staff have conceived of a Tree Management/Maintenance Plan that would be adopted for a multi-year period, subject to periodic reviews and renewals. Such a Plan could incorporate the operating practices and standards of the many facets of golf course operations while ensuring that tree management practices meet the goals of this program. This would streamline the process for a large area and still comply with the intent of the program. It may also be possible to integrate this effort with the Airport Futures Environmental Code updates.

We would encourage the Planning Commission to support the general concept of a programmatic type of approach. We look forward to working with staff to develop a program that would meet these requirements.


John Lof, Golf Course Superintendent
Riverside Golf and Country Club

cc: Roberta Jortner
Mindy Brooks
Jay Sugnet


Riverside GOLF AND COUNTRY CLUB

8105 NORTHEAST 33RD DRIVE PORTLAND, OR 97211-2095 PHONE: (503) 288-6468 FAX: (503) 282-1383

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PORTLAND PARKS & RECREATION

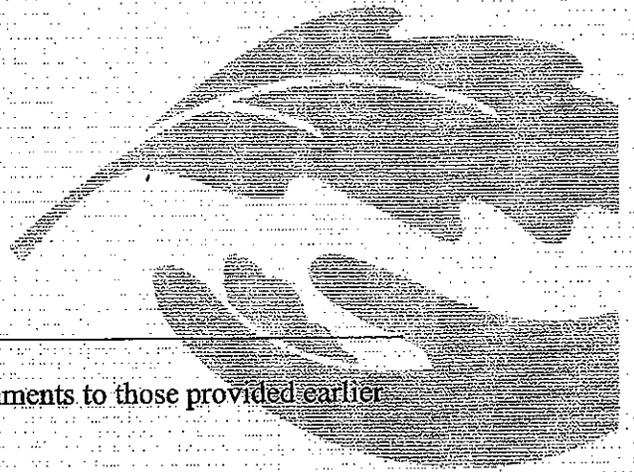
Healthy Parks, Healthy Portland

Date: April 12, 2010

To: Planning/Forestry Commissions

From: David McAllister City Forester

Re: Citywide Tree Project Draft Review



Urban Forestry offers the following additional comments to those provided earlier on the draft:

1. The proposed draft represents a more complex and expanded set of regulations that will require additional staff, additional training, and additional outreach. It will certainly add time and may increase confusion for most tree permitting activities. Trees are living biological entities that do not lend themselves to strict code language at the detail that it is being proposed. Rather, trees are best addressed by code standards with implementation on a case by case basis and consideration by professionals. The proposed code should emphasize professional judgment with an explicit set of standards rather than the proposed listing of alternative approaches that may or may not meet the intent.

In non-development situations, the three different permit types, coupled with appeal rights, and different mitigation standards will be a challenge for staff to effectively communicate. Staff fears that a high level of complexity will contribute to higher levels of non-compliance because of a lack of public understanding and acceptance. Communication is essential to help the public understand the City's goal for the regulation, its rationale, and the regulated community's responsibility. In reviewing this draft, staff hopes that Commissioners try to keep in mind the goal of this section of the code which is to compensate for tree cutting by requiring mitigation by which our future urban forest can be maintained. Much of these regulations can be removed while still retaining the strength of the intent and its application. Procedural overhead should be kept to a minimum with the focus placed on providing adequate funding for the professionals working in the field.

2. Encouraging tree preservation and requiring tree mitigation for tree cutting in development situations is a significant and noteworthy addition to achieving City tree canopy goals. Development and especially in-fill development is its own

City Nature Department
Urban Forestry Division
1120 S.W. 5th Ave., Suite 1302
Portland, OR 97204
Tel: (503) 823-7529 Fax: (503) 823-6007

www.PortlandParks.org
Zari Santner, Director
Nick Fish, Commissioner

Sustaining a healthy park and recreation system to make Portland a great place to live, work and play.

T.38

important City goal but is contributing to loss in mature tree canopy. City tree inspectors find that most of the mature tree cutting they investigate is associated with development actions. Any manner that the City can find to encourage more tree preservation during development and to require mitigation for canopy loss is positive. Contrary to what is oftentimes expressed, tree preservation is not a lose-lose proposition for developers since scientific study after study indicates that mature trees enhance property values and increase salability. Builders may well see higher profits if they retain trees during development, thus reducing building costs, and pricing accordingly since the development can now be sold with mature plantings already established.

3. Staff feels that the code can be more tightly written and thus briefer if much of the procedural information is codified through administrative rules. Procedures are subject to change and therefore should be easily amended rather than, as drafted, only through Council action. Several examples are 11.300.030 Application Requirements on Page 49 and 11.600.050 Tree Plan Submittal Requirements on page 119. Both of these procedures should not be adopted in the Code. There are numerous other areas that should be removed and placed in an administrative rule procedural document.

4. The draft code (Sec 11.100----) deals with established and authorities for payment in lieu. This draft code language confuses authorities previously established under the City Urban Forestry Tree Fund and Title 33 private tree fund. The new code should be changed to reflect historic authorities and responsibilities for allocation of these funds.

5. The proposed code (11.600.060) offers the public the right to appeal tree cutting of healthy trees greater than 20" in diameter or slow growing natives greater than 6" in diameter in non-development situations. These code provisions are very confusing, increasing code complexity by creating a separate permit and process (Type C), without providing a clear public benefit. There are several issues with this section which should be addressed:

- The provision applies only to non-development situations. If the intent is to provide the public with the right to appeal removal of large trees then it should be equally applied to development situations where most of the healthy large trees are being removed;
- The criteria for issuing and/or appealing a permit are unclear and thus nearly impossible to adequately implement. This criteria "the proposed removal will not significantly affect the neighborhood character or identity" is impossibly fuzzy.
- The appeal can be brought by any public, even those outside the City of Portland, without a specific interest or concern with the neighborhood.

6. Section 11.300.070 which addresses programmatic permits is currently implemented by Urban Forestry to efficiently and effectively address large tree care and maintenance issues. The narrative states "these programmatic permits are for more routine and customary maintenance practices". If this is the case, staff is not

sure why the proposed section of the code adds significant process without any clear affect to the permit or the public. The section also needs to be rewritten because the language contradicts itself providing criteria for the City Forester to grant the permit in one section and implies a role for the Forestry Commission to delegate this responsibility to the City Forester in another section. Staff encourages code where it meets the intent helping reach City canopy goals. This whole section could be removed without jeopardizing this objective.

April 12, 2010

RE: CITYWIDE TREE PROJECT

Dear Portland Planning Commission President Hanson:

I have already testified regarding the Citywide Tree Project you are considering and while there are many more things to say, I know you will work hard to find ways to send a good proposal forward to Council for further consideration.

I think there are two elements of this discussion that focus things for me and I wanted to pass them along as my additional testimony.

1. The current project came about to bring various code elements together from many different bureaus and combine them into one area of the code. The result is complex and may be overly complex, but it can't be as complex as having the code spread throughout many bureaus for their interpretation, implementation, and disclosure. I have provided an example of this jurisdictional chaos in this letter.

The Tree Project came about in the absence of a coherent city policy about trees. That, in my opinion, is what you are being asked to recommend to Council for adoption. The process to implement the policy should be subject to more attention and work during FY 2011-2012, with a set timeline for beginning implementation funding in the near future.

2. Trees are in a transition as to how we think about them. They have been considered decorative to a large extent, subject to only owner control, and replaceable. That limited view no longer serves the interests of our City residents.

I believe we are moving into thinking of trees in terms of function. That makes canopy loss and watershed values of primary importance as we regulate and inform our actions regarding trees. It also makes the protected tree size more important to the discussion.

T.39

The functional loss of tree value cannot be separated from where we live. We cannot be expected to replace those functional values elsewhere. That makes it essential to find ways to avoid the loss. Incentives for tree retention, education about tree value, information about how to protect trees and our tree canopy, and regulation that evaluates and guides unavoidable tree removal are all tools we can use.

A significant part of maintaining those functional values has got to be a realistic assessment of mitigation, identification of geographical areas impacted by tree loss, and the philosophical transition of trees into the status of green infrastructure that deliver public good beyond the property on which they grow.

I have included a small example of our current “system” described in code as tree protection. This is a currently active case which we have challenged so I will not refer to it beyond the fact that it is in East Portland. A Tree Preservation Plan was a condition required by the decision permitting a land division. The land division removed 61% of the trees on site, only 4% less than the maximum tree removal allowed by code. The Tree Preservation Plan was chosen by the applicant as one of four approaches provided in code to address tree protection requirements for the land division.

The majority of the removed trees were mature Douglas Fir. The Tree Preservation Plan stipulated the land division retain 3 mature Douglas Fir (24”, 25”, and 13”) at the resulting sites. The new owners of the houses that were built cut down those remaining “protected” trees and are currently being cited for a violation. They state they knew nothing of the Tree Preservation Plan nor that the trees were to be protected.

Whether or not that is true (the current Tree Preservation Plans are not attached to the deed as the Citywide Tree Project would propose) the solutions provided by various involved bureaus are where the real problem discloses itself.

Our East Portland Neighborhood Coalition Land Use Committee responded to the violation notice suggesting a less expensive way for assisting the home owners to return tree canopy to the neighborhood area in which it was lost:

Here is part of the staff comment to that suggestion:

“Overall, I understand the Association’s frustration that 61” of tree diameter was removed, unfortunately, the Zoning Code does not require the same number of inches of tree diameter to be replaced or mitigated for as was removed during a tree violation. I also understand your desire to have the mitigation trees planted in the same watershed. I spoke with my supervisor about it, and there is really not a code nexus. The environmental code allows you to require mitigation in the same watershed, but the Tree violation code chapter does not have that option. I would recommend contacting the Park Bureau about using the new tree fund money they receive from this violation to use for new trees for Parks in the area the violation occurred.”

Note: There are no parks in the area, the Parks Bureau is not required to plant trees in areas in which they are lost, and Tree Fund decisions are made internally by the bureau.

I think this single example explains in many ways why you, as a member of the Planning Commission considering the Citywide Tree Project, need to send a strong set of recommendations forward to Council that finally begin to deal with trees more broadly than internal jurisdictional distinctions or views of trees as replaceable decoration.

I look forward to seeing the results of your consideration of the Citywide Tree Project and how it can provide clear guidance to our City’s green infrastructure in the future.

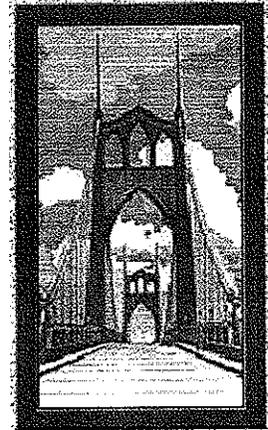
Bonny McKnight

1617 NE 140th; Portland 97230

503-253-6848 or bonnymck@comcast.net

FRIENDS of CATHEDRAL PARK NEIGHBORHOOD ASSOCIATION

March 26, 2010
Planning Commission
c/o Bureau of Planning
1900 SW 4th Ave., Suite 7100
Portland, OR 97201-5380



Dear commissioners,

As a north Portland neighbor and neighborhood association chair, I completely support the Citywide Tree Policy and have long wished for a better way to protect existing tree canopy and a policy to help advocate for increased canopy. The single point of contact and single manual is helpful in offering citizens a better connection to information. I support neighborhood tree plans to reflect the differing needs of individual areas and to engage local citizens in feedback. Because half of Portland's tree canopy is in private hands, the educational outreach will be a crucial element. In fact, it would be very beneficial to do more education than outlined in the policy.

I especially support better protection for native trees like Oregon oak and Madrone that dominate the Willamette Bluff which ends in the St. Johns neighborhood. We have very few oak groves left from a once vigorous population on our peninsula and have had difficulty protecting what's left. In fact it's estimated there are only 1-2% of native oak left in the Willamette Valley due to human encroachment. It is not well known that only a few miles from St. Johns, there is a National Historic Landmark archeological site on Sauvie Island that has more than 60 native American made acorn pits, each able to hold thousands of acorns. It is the largest acorn pit site in North America¹. This gives some idea how numerous and important native oak once were here.

Other relevant facts:

- Native oak are one of the highest value trees for wildlife habitat and food. Their lichens, mosses, and acorns are important food sources for a wide variety of species. They create important habitat both underneath the tree and vertically.
- Native plants evolved with wildlife so native trees are particularly important as a natural, lesser expensive aid in helping maintain both plant and local animal biodiversity.
- It is believed by some scientists that heat-tolerant native oaks will be able to withstand global warming better than other trees.
- Oregon oak are historically important in the native American culture of north Portland and we would like to work toward preserving and capturing that history for future generations.

Another important feature of tree canopy in a pedestrian district like St. Johns is its role in offering a shaded environment to encourage walking in the summer. Attractive transportation alternatives are important in making shopping and working locally doable. In the summer, I always choose walking routes with trees. By encouraging neighbors to stay local there can be the added benefit of efficiency and savings on auto transportation infrastructure.

Thank you sincerely,

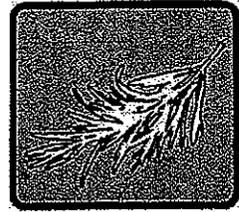
Barbara Quinn

Barbara Quinn, chair, Friends of Cathedral Park Neighborhood Association
7034 N. Charleston
Portland OR 97203

¹ Bramlett, Gina. "'Sunken Village' unearths Native American culture on Sauvie Island." The South County Spotlight, Oct. 3, 2007. www.spotlightnews.net/features/story.php?story_id=119143980327063700.

T.40

EAST PORTLAND PARKS COALITION



April 6, 2010

Mayor Sam Adams
Commissioner Amanda Fritz
Commissioner Nick Fish
Commissioner Dan Saltzman
Commissioner Randy Leonard

Director Zari Santer, Portland Parks and Recreation

Greetings,

Title 11 to the City Code: The Tree Policy would allow for a concise and consistent City repose to issues relating to trees.

Currently, there is confusion amongst citizens and staff, between bureaus and within the development community regarding trees. Title 11 will provide a clearer understanding for residents and businesses.

East Portland Parks Coalition thanks the City of Portland for supporting Title 11 and funding the project.

We strongly encourage adoption of Title 11.

Thank you,

Respectfully,
Alesia J. Reese
Chair
East Portland Park Coalition

T.41

April 13, 2010

Portland Planning Commission
1900 SW 4th Ave, Suite 7100
Portland OR 97201

Urban Forestry Commission
1120 SW 5th Ave, Suite 1302
Portland, OR 97204

RE: Citywide Tree Project Policy Review and Regulatory Improvement Project

Dear Commissioners:

As one of several citizens who "pestered" the city for several years to "fix" the many problems with the existing tree codes, and as a member of the Citywide Tree Project Stakeholders Advisory Committee, I strongly encourage the Planning Commission and the Urban Forestry Commission to move forward with a recommendation that City Council adopt and fund this important program.

Tree issues have been a part of my daily life for many years. In addition to serving on the Project Stakeholders Advisory Committee, my background includes being a founding member of the Columbia Slough Watershed Council, developing and managing the Naturescaping for Clean Rivers program for many years (until I retired), and being a member of the Hazelwood Neighborhood Assn (where I chair the Parks and Environment Committee). In addition, I currently serve on the Portland Parks Board.

I'm pleased to see that the city has recognized the importance of trees as part of the city's infrastructure and is making this effort to codify that status. I believe Planning Bureau staff have made a concerted effort to develop consistent standards for the preservation and planting of trees without unduly increasing the time and cost to development in the city.

Here are a few more specific comments/questions/concerns that I would like to share with you.

- a) The proposed Tree Manual and single point of contact for citizen inquiries will be a very important part of this program. Both should be developed and implemented as soon as possible.
- b) While I appreciate the educational value of face-to-face interaction with individuals/businesses seeking tree permits, I am concerned that the volume of such interactions could be overwhelming. Some of these contacts could/should be handled on-line. You might be surprised at how often citizens turn to on-line sources for information.
- c) I'm especially pleased to see the proposed changes that require replacement of trees removed from the transition zone (within the environmental zone). This is critical for riparian areas, which tend to be long and narrow with a considerable portion of the environmental zone falling within the transitional area.

T.42

- d) Will these new tree codes apply within Plan Districts like the Columbia South Shore Plan District? Because some of these plan districts have their own environmental requirements, citywide code changes don't always apply within the plan district area. Is there some way to make sure that the new code sets a minimum standard that applies to all plan districts, while still allowing them to have more stringent codes as appropriate?
- e) The proposal is to delay the effective date for at least a year. This will provide time for the City to "gear up" for the change. I'm concerned, however, that little if any funding has been allocated for the 2009-2010 fiscal year to set up the single point of contact, create the Tree Manual, prepare printed information explaining the changes, do the staff training and conduct the public outreach (to both tree care professionals and citizens) – all the things that need to be done before the new code goes into effect.
- f) In looking at the proposed code for development situations, I feel that the 20-inch diameter threshold is too large. For example, very few of the many trees in the subdivision where I live (developed in the 1960's) are 20-inches in diameter. Actually, there aren't that many that are even 12-inches in diameter, which is the trigger for a tree removal permit. I recommend lowering the threshold sizes for both.
- g) Because the proposal before you represents major changes to the existing city code, I understand that you are receiving a large volume of comments, with very divergent perspectives and recommendations. If there are any significant changes to the code in the current proposal, and I understand that some significant changes may be proposed soon, I urge you to undergo another round of public review and comment before making your recommendation to City Council. I realize that this re-iterative process can be time-consuming, but doing so will improve the program and be critical to public understanding and acceptance of the changes.

Finally, I believe the Citywide Tree Policy Review and Regulatory Improvement Project represents a major step forward in acknowledging the importance of the city's green infrastructure, especially the role it plays in stormwater management. I urge you to move the project forward for adoption.

Sincerely,

Linda Robinson
1115 NE 135th Ave
Portland, OR 97230
503-261-9566

Hamilton, Joan

From: Second Nature Garden Design [sngd@comcast.net]
Sent: Thursday, March 25, 2010 12:21 PM
To: Planning Commission
Subject: Comments for: Citywide Tree Policy Review and Regulatory Reform Project
Follow Up Flag: Follow up
Flag Status: Red
Attachments: image001.jpg

Dear Commissioners:

I urge you to push forward the tree project, with some important changes.

First, I strongly suggest that the proposed regulation to require permits to remove healthy 12-inch or larger diameter trees on private property be changed to 6-inch diameter. Here's why: Depending on the species, 11 or even 7-inch diameter trees are substantial and may be well on their way to providing the mature, wide canopies essential to a healthy urban ecosystem. If we allow any trees less than 12 inches to be removed, it will be extremely difficult to get to the desired tree density. And as the older, huge trees (that would be protected under this regulation) die out, we would be left with very few large trees to take their place. Exceptions should be made for property owners who want to replace trees that remain small at maturity—for example, replacing a small, non-native, ornamental 20-foot tree, with a native tree that grows to 70 feet tall and 50 feet wide.

I have personally witnessed several situations within a mile of my home in northeast Portland in which many healthy, mature native conifers – no doubt heavily relied upon by native wildlife – were removed by homeowners, for no good reason other than to let more sun into their backyard. In one case, the homeowners reside most of the year in California! But even if the trees removed had been smaller – say 10 inches in diameter – their removal would have been just as unnecessary and equally unjustifiable.

Second, I'd like to see much more emphasis on native trees, especially conifers. Native species are absolutely crucial for wildlife because they evolved together. Native fauna is highly dependent on native plants that provide food, shelter and breeding habitat. If we claim we want to help dwindling native birds flourish in our city, we must provide for their needs. Conifers are especially important and can be lifesavers after deciduous trees have dropped their leaves. In addition, they are an important source of seeds and insects and serve as excellent nest and roost sites for many birds.

Finally, one of the worst things we can do for wildlife is to be too tidy outdoors. Snags (dead, decaying trees) should and can be safely retained, as they provide tremendous value to wildlife with immense amounts of food, as well as nesting and perching sites. People removing trees should be encouraged to leave down wood (logs left on the ground) that also provides shelter and food for many small animals as it slowly returns nutrients to the soil.

Because trees have a positive effect on everyone – humans and wildlife, alike – they ought not be regarded as personal possessions. Instead, trees should be fiercely protected and considered green infrastructure that provide essential services. Unlike infrastructure such as sewers and roads, trees offer much more but cannot be repaired or quickly replaced. Therefore, it is imperative that trees on public *and private land* be revered and protected to the greatest extent possible.

4/1/2010

T. 43

Thank you for considering my comments.

Sincerely,

Eileen Stark
Biologist and landscape designer

Second Nature Garden Design
3820 NE Wistaria Dr.
Portland, OR 97212
503-467-8545
www.sngdesign.net

.....

"The wonder is that we can see these trees and
not wonder more." - Emerson

Hamilton, Joan

From: Second Nature Garden Design [sngd@comcast.net]
Sent: Tuesday, April 06, 2010 11:43 AM
To: Planning Commission
Subject: Citywide Tree Policy Project comments
Attachments: image001.jpg; Tree Policy Comments ADDENDUM.doc; Tree Policy Comments 3.24.10.doc

Dear Commissioners:

Please accept the following additional comments that were inadvertently left out of my previous comments dated March 24, 2010. (This addendum and my previous comments are also offered as attachments.)

I strongly recommend that the commission advocate for more **native broadleaf evergreen trees and conifers**, for the following reasons:

- Persistent leaves. Because their leaves hang on during our rainy months, broadleaf evergreens and conifers are much better than deciduous trees at slowing rainfall, which results in less stormwater runoff. Deciduous trees also collect rainfall on their branches, but to a much smaller extent. Which type of tree would you chose to stand under on a rainy Portland day—dense conifer or leafless maple? If Portland is serious about mitigating excess stormwater, planting evergreen trees should be compulsory.
- Essential for wildlife. No doubt you are aware of the grave decline of many wild bird species due to habitat loss and other man-made perils. Deciduous trees, particularly native species, are critical to wildlife which depends on these trees to provide cover, nesting habitat and food.
- Northwest beauty. Although there are some disadvantages of growing evergreens as street trees (branches that may obstruct paths and potential weakening in windstorms if planted in too small a parking strip), they are often a beautiful choice for yards and open spaces and are an important part of the region's natural heritage and identity.

For the above reasons I urge you to advance a substantial increase in the number of evergreen – primarily native – trees in the Portland area.

Thank you again for considering my comments.

Sincerely,

Eileen Stark
Biologist and landscape designer

Eileen Stark
Second Nature Garden Design
3820 NE Wistaria Dr.
Portland, OR 97212

4/6/2010

T.44

23 March 2010

SWHRL Tree Policy testimony for Tuesday, 6pm joint Hearing of Planning Commission and Urban Forestry

To whom it may concern,

My name is Jim Thayer, President of SWHRL, The Southwest Hills Residential League. I am here to today to give testimony in strong support, on behalf on my neighborhood association and members, for the proposed Tree Policy Guidelines.

The proposed guidelines are step forward in clarifying the regulation of trees in the City of Portland and supporting the goals of this region and City in providing a clear and cohesive regulator framework and in enhancing the urban forest.

The City Staff on this project have been communicative, responsive, thorough and meticulous in not only their review of the current regulations, a ungainly task in itself, but also in working with all stakeholders in developing policies, code changes, and streamlined regulations that would benefit all parties.

This effort has taken many years to get to this point and it is important that we take this next step to comprehensively address and fix many of the issues surrounding Trees in our City.

Does the proposed package meet all or our expectations? Not necessarily. For example, Would we like even stronger regulations to protect many of our existing, mature native trees within the City of Portland? Yes. There are other specifics that could be pointed to. But, it is our view that the current package before you has been carefully crafted to meet the performance standards and goals of the City of Portland, building in flexibility and performance standards to meet the diverse parts of the City and the specifics of its unique places.

Some might say no regulation is good regulation. The goals of these new, updated policies is to streamline existing complicated, conflicting and ineffectual regulations; not to create new ones.

Even if the City is unable to fund certain pieces of the Tree Project, it is important the overall package, code changes and policies are implemented now. If funding were not initially available, pieces like "Community Tree Manual" could be phased in / developed later, but at least the whole project would be adopted by the City. This is truly an opportunity for the City of Portland to provide real tools and opportunities on the ground to support its goals as a green and sustainable City to address many of the egrerious practices in the removal of our urban forest and its negative impacts on our communities.

SWHRL (Southwest Hills Residential League) strongly supports the adoption of the Tree Project.

Thanks for your consideration,

Best regards,

Jim Thayer, Southwest Hills Residential League, President

T.45

Beckman, Stephanie

From: Hamilton, Joan on behalf of Planning Commission
Sent: Thursday, April 01, 2010 11:15 AM
To: Jortner, Roberta (Planning); Tracy, Morgan (Planning); Beckman, Stephanie
Subject: FW: Showing my support

Joan Hamilton
Planning Commission / PTE Contracts Coordinator
Bureau of Planning and Sustainability
1900 SW 4th Avenue, Room 7100
Portland OR 97201
Interoffice: B299/7100
Telephone: 503-823-5772
email: joan.hamilton@portlandoregon.gov
Please note the City's new web domain www.portlandoregon.gov and my new email address
joan.hamilton@portlandoregon.gov

From: Judy Todd [mailto:judy@yournatureconnect.com]
Sent: Wednesday, March 31, 2010 1:50 PM
To: Planning Commission
Subject: Showing my support

While I have cut and pasted this information, be clear it speaks for me and addresses concerns I share.

Please support stronger protections for our urban tree canopy: Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects and improve our quality of life and livability of our city.

It is critical that we protect our existing tree canopy as well as planting new trees. It takes years for a tree to grow and reach its full potential and newly planted trees are highly vulnerable. To be effective, any tree strategy must focus first and foremost on protecting our existing tree canopy.

Please support stronger protections for trees on single, non-dividable, residential lots in non-development situations: The proposed new code calls requires a permit and mitigation (either planting of new trees or payment of a fee that goes toward planting trees elsewhere) for cutting trees over twelve inches in diameter on single family, non dividable lots in non-development situations. These parcels cover more than 25% of our urban landscape. Please support this provision and urge the commissioners to consider lowering the threshold to six inch diameter trees.

It is critical that we all take responsibility for trees: Tree protections should be

T.46

comprehensive across all land use types and for both development and non development related activities.

Judy Todd
1631 NE Broadway St. #723
Portland, OR 97232

503-260-4995 mobile

Cherish nature, be brave, share your vision.

Columbia Slough Watershed Council
7040 NE 47th Ave, Portland, OR 97218

April 9, 2010

Portland Planning Commission
1900 SW 4th Ave, Suite 7100
Portland OR 97201

Urban Forestry Commission
1120 SW 5th Ave, Suite 1302
Portland, OR 97204

RE: Citywide Tree Project and proposed changes to tree codes

Dear Commissioners:

On behalf of the Columbia Slough Watershed Council, I am writing to express support for the City of Portland's proposed Title 11 which consolidates, fixes, and updates the city's tree codes.

The Council reached consensus about the importance of making the tree codes easier to find, more equitable, and easier to understand. We also support the creation of a comprehensive framework for both public and private trees and for development and non-development situations. There is also agreement that inconsistencies, contradictions and gaps in coverage need to be fixed.

Such extensive changes in tree regulations will require substantial investment in implementation and training (of permit staff, inspectors, arborists and others) – and extensive public outreach before and after the new regulations are implemented. We urge the City to move forward on the proposed Tree Code as soon as possible, as it will be a very useful tool in this education and outreach.

One proposed change of special interest to the Council is the one that would require mitigation for trees removed from the transition zone within the E-Zone. It is especially important to provide and protect vegetated buffers along sloughs and wetlands with narrow riparian areas. We support this change.

We also applaud the City's efforts to keep the tree cutting permit process from adding undo time and expense for residents, developers, and those wanting to expand existing businesses. We wish to add that the costs of permits under the code should be reasonable and affordable for city residents.

Given that you are receiving many comments on this project, we ask that any significant changes to the code as currently written should be submitted for public review and comment before final adoption.

Thank you for considering our comments in support of the Citywide Tree Policy Review and Regulatory Improvement Project.

Sincerely,
Jane A. Van Dyke
Jane A. Van Dyke
Executive Director

T.47

My name is Mary Vogel and I run a consulting business, PlanGreen that helps communities and organizations add ecosystem services to excellent urban design—especially to infill design. I also chair the Portland Downtown Neighborhood Association Sustainability Committee and I'm a founding member of a new Cascadia chapter of the Congress for the New Urbanism.

CCNU has not taken a stand on the Tree Policy yet, but our designers preserved most of the existing trees (more than half of the 430 existing trees and all of the largest ones) while greatly increasing density at New Columbia. (From 400 units in the old Columbia Villa to 852 units, 620 of which are affordable.) They showed that increasing density and tree preservation can go hand in hand. DESIGN MATTERS!

I'm also a Council Member of Tryon Creek Watershed Council (TCWC) and a Crew Leader for Friends of Trees—both of which you have already heard from today.

I agree with Audubon's recommended thresholds and on their stress on the importance of NATIVE TREES as habitat. And also with that of TCWC's similar stress on natives and its further suggestion of leaving snags as habitat as well.

I agree with Bonnie McKnight on the importance of the process that has taken place to get us to this point and would like to recognize her in helping it along the way through involving her Citywide Land Use Group—in which I occasionally participate. Unlike most in that group, I have chosen to live downtown and I support dense infill. As an environmentalist I do not want to be part of a group that uses environmental protection to support its NIMBYISM. So, I watched carefully for this tendency in Bonnie's group of neighborhood Land Use Chairs. I felt this process helped them to overcome such attitudes in fact.

I agree with Barbara Quinn re: the importance of trees in promoting a walkable environment so that people will be more encouraged to "Shop Local!" I'd like to take that one step further to "Plant Local!" and put even more emphasis on native trees.

My one new recommendation would be to even more strongly stress the importance of NATIVE TREES in the new Tree Manual and any other educational material. I would also like to more emphasis on natives as street trees. In the interest of time, I will refer you to my blog for Sustainable Industries at <http://blog.sustainableindustries.com/category/built-environment/> for my reasons for why I say GO NATIVE!

Mary Vogel, CNU-A
PlanGreen

Putting Ecosystem Services into Excellent Urban Design
A Woman Business Enterprise in Oregon

503-245-7858
mary@plangreen.net
<http://www.plangreen.net>

Follow Me  LinkedIn  Facebook  Twitter  MyBlogLog  Wordpress

T.48

March 28, 2010

Richard Weber
3820 NE Wistaria Drive
Portland, Oregon 97212

9

Portland Planning Commission and the Urban Forestry Commission
1900 SW Fourth
Suite 7100
Portland, Oregon 97201

RE: Citywide Tree Policy Review and Regulatory Reform Project

Dear Commission Members,

I would like to express my support for the adoption of measures within the proposed Title 11 Tree Code to preserve existing tree canopy within the Portland metropolitan area on both public and private land, especially in those cases when the land is subject to "development." In my own NE Portland neighborhood I have personally witnessed the unnecessary removal of majestic, mature conifers to make way for the construction of perfectly monstrous and hideous houses that neither respect the neighborhood architecture nor display any sensitivity to harmonize with the surrounding environment. The individuals responsible for this are interested solely in constructing the largest possible edifice and to then to quickly sell them (if they are lucky—many times these houses sit vacant for want of buyers). The developers have no vested interest in beauty, wildlife habitat or the long term livability of our neighborhoods. As such, I particularly urge you to:

- Require a permit with a neighborhood comment and review phase for the removal of any tree greater than 6" in diameter on public or private property. The current proposal of 12" is not adequate, as many existing trees may never survive the axe and get the chance to become large trees in this scenario.
- Require that all new construction incorporate, whenever possible, existing trees on the site into the plan. Priority should be given to the preservation of healthy trees, not to the construction of the largest possible structure.

Large, mature trees take generations to grow and mature, yet they can be removed today arbitrarily and without public review. For Portland to significantly increase our urban canopy, I urge you to include these requirements in the proposed Tree Code.

Thank you for your consideration of these comments.

Sincerely,



Richard Weber

T.49



March 24, 2010
The Art and Science of Tree Care

RECEIVED
PLANNING BUREAU

2010 APR -2 P 4: 21

Concerning The Citywide Tree Policy Review and Regulatory Improvement
Project Stakeholder Discussion Group (SDG)

I'm Jim Wentworth-Plato. I participated as an arborist on the SDG. I've been working with trees in the Portland and surrounding areas since the mid 90's and have achieved the Board Certified Master Arborist accreditation from the International Society of Arboriculture (ISA) and I'm a Certified Tree Risk Assessor. I operate a small business caring for our urban forest through planting, pruning for health and longevity, and removing trees when the need arises. I talk with homeowners on a daily basis about their tree concerns and needs.

The proposals in the Review and draft amendments are not focused only on increasing canopy cover in our city, but increasing clarity and communication of regulations concerning trees. I strongly support the creation of a tree manual as a resource for home and business owners, developers, and arborists. There are many resources for identification, choosing, planting, and pruning trees on the web, but it's currently difficult for the average Portlander to find rules regarding what they can and can't do to trees. It's unfair to hold people accountable for what they don't know. A contact person at the city to answer questions, handle complaints, and document violations will create goodwill and allow the city to respond to problems in a timely fashion.

The stated goals of the city are to increase canopy cover from 26 to 33 percent. Another goal of the city is infill instead of sprawl. There is a lot of friction in this debate. I support both goals, but I'm witnessing a shrinking and decline of our urban forest and livability. Smaller lot sizes don't leave room for a large canopy tree and a building. In these areas, the city may want to consider additional mini-parks or groves of trees on a single sacrificial property, so the building density can be higher on surrounding properties and still allow enough space for mature trees.

As an arborist in Portland, I've seen many violations by home owners, developers, landscapers, and people calling themselves arborists. I've forwarded phone calls from clients concerned about what their neighbors are doing or a construction project that they just don't think is right and I appreciate the assistance of Urban Forestry. There are two types of violators, the ignorant, and the ones taking a calculated risk.

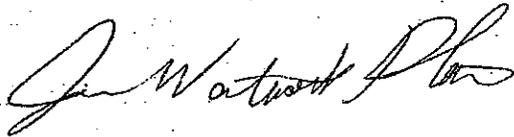
7.50

We can educate and provide resources for the uninformed to do things properly, but the people betting they won't get caught won't follow improved codes either. The biggest problem with poor tree care is that one bad pruning can destroy 100 years of good pruning and the tree. Another problem is that root damage from construction, grade changes, and compaction, rarely manifest for 3-5 years from the time of injury. It behooves us to enforce preservation now to avoid larger problems later. How? There should be a posted sign for concerned citizens to report illegal behavior near the perimeter of construction sites. That number would get you to a person at the city with the ability to address violations in a timely manner and will reduce repeat offenses.

While I applaud the work done to refine, clarify, and consolidate the tree codes, I have a few specific concerns.

- Removal permits for trees over 12" is too large. I understand the problem of staffing site visits, but many trees, particularly the trees that mature to a smaller height, may take 10 years to get to that size. I recommend 8-10" because many seeded trees grow quickly to 4" and many ornamental trees take quite a while to get to large diameters. Nuisance trees should be exempt.
- Removal should have an emergency permit allowed with photos.
- Replanting should be allowed any time, but encouraged to be done in the wet months, instead of the 30 day timeframe.
- I encourage you to consider requiring businesses that get licensed for tree work in the city to have certified arborists on every job site. The ISA has a widely accepted program for certification.
- There are many trees in the city that are under protection of tree preservation but few arborists or homeowners know if the tree they are working on is on a plan. There needs to be an easy way to access this database if you want compliance. Perhaps putting it on Portlandmaps.com?

Thank you for taking the time to review my concerns.



Sincerely,
Jim Wentworth-Plato
BCMA #PN-1314B
Emerald Tree

**Written Testimony Submitted for PC / UFC hearing on
Citywide Tree Project**

Submitted for 4/27/10 record

	Name	Organization	Date
51	Scarlett, Paul	BDS	4/26/10
52	BES Tree Code Option		4/27/10
53	Colasurdo, Christine		4/13/10
54	Nielson, David	Homebuilders Association	4/27/10
55	Wright, Tom	Group Mackenzie	4/12/10
56	Schifsky, Greg		4/27/10



Office of the Director
City of Portland, Oregon - Bureau of Development Services
1900 SW 4th Avenue, Suite 5000 • Portland, Oregon 97201
503-823-7308 • Fax 503-823-7250 • TTY 503-823-6868 • www.portlandonline.com/bds

MEMO

Date: April 26, 2010

To: Portland Planning Commission
Portland Urban Forestry Commission

From: Paul L. Scarlett, Director *PLS*
Bureau of Development Services

CC: Susan Anderson, Paul Scarlett, Zari Santner, Dean Marriott, Joe Zehnder, Roberta Jortner, David McAllister, Stephanie Beckman, Morgan Tracy, Mary Wahl, Rebecca Esau, Ross Caron, Ty Kovatch, Mike Liefeld, Douglas Hardy, Kimberly Tallant, Kim Freeman, Rob Crouch, Kathleen Murrin, Frank Krawczyk

SUBJECT: Citywide Tree Project - February 2010 Proposed Draft

BDS is fully supportive of the goal to increase tree canopy in the City of Portland. The regulations that are written to achieve this goal need to be simple, clear, user-friendly, and cost-effective.

Mayor Adams met with Bureau Directors and the City's Labor leaders on April 15, 2010, and discussed the City's financial situation. The City is in a very challenging time financially and many bureaus will need to cut staff and programs. There will be no General Fund money to fund new tree regulations or the positions necessary to administer them.

When you consider the Citywide Tree Proposal, it is important for you to have a realistic picture of the financial and staffing situation at BDS. Our bureau is largely reliant on fee revenue from permit applications, and we receive very little General Fund support. The recession has resulted in a decrease in large, high-value development projects in the City. We still have a lot of development projects to review, permit, and inspect, but the projects are smaller, with lower valuation and, hence, produce less revenue.

Due to our financial situation, we had to make the difficult decision to layoff staff last year to balance the budget. We reduced our staffing levels by about half, from about 315 employees to only 160 employees.

The reductions in staff have resulted in serious impacts to our ability to provide services to the public. For example, we closed the Development Services Center (DSC) on Mondays, to allow staff time to work on Building Permit Plan Reviews and we are unable to comply with the deadlines set in the Zoning Code for Land Use Reviews.

Adding new regulations without a funding source will only worsen the situation, and is simply unacceptable. Given our financial situation and reduced staffing levels, BDS is not in a position to take on any new regulation or task that will add cost or complexity to the bureau's service delivery. It is necessary to either:

- Focus on a cost-neutral approach now - Find small, incremental code improvements that we can move forward with now to achieve project goals, that won't add cost; or
- Focus on a regulatory package that is simpler than the proposed regulations, but that goes further than small, incremental code improvements, but set the effective date to coincide with when General Fund money is available to fund the program. This is a difficult option because we don't know how many years it will be until General Fund money will be available, so we don't recommend it.

Delaying the effective date is not enough without radically simplifying the regulations. The regulations are overly complicated and too expensive to administer, even in the best of financial times. An example of the complexity of the regulations is the number of variables to consider, such as the category the tree is in, the size and species thresholds, the condition of the tree, the types of permits, and the different procedures.

It is not realistic to assume that the proposed tree regulations can ever be completely supported by Tree Permit fee revenue alone. If the program were completely funded by fee revenue, the fees would be too high and would act as a disincentive for getting the required Tree Permits. For example, if a person wanted to cut a tree down on a site that was already developed, the Tree Permit fee (if it was set to cover the actual cost of the services associated with the tree program) would be approximately \$1,300. The fees would need to be set to cover the whole tree program, including staff time spent explaining regulations to the public, site visits, inspections, following up on complaints about non-compliance, etc. The reality is that the costs to administer tree regulations will require a subsidy from either the General Fund or some other source, on an ongoing basis.

The Bureau of Development Services recommends the following:

- Focus on a cost-neutral approach now - Find small, incremental code improvements that we can move forward with to achieve project goals, that won't add cost. Then ask BPS to monitor these changes, and return in several years with Phase II to make further improvements.

Again, we are supportive of the goals to consolidate and streamline the City's existing tree regulations, and to find very simple, cost-neutral ways to increase tree canopy. While everyone loves trees, and wants trees to be protected and more trees to be planted, there is a cost associated with this goal. It is necessary to limit the City's regulatory changes to cost-neutral solutions that will result in incremental improvements, and to think long-term with an emphasis on tree planting. We ask that you think of this project as a first phase, and then in several years, the City can assess the tree canopy situation again, and make more incremental changes as needed.

Thank you for your consideration. My staff and I are committed to continuing to work with you and all stakeholders as we collectively develop a simpler, cost-neutral approach that will achieve incremental improvements to the City's urban forest.



CITY OF PORTLAND ENVIRONMENTAL SERVICES



1120 SW Fifth Avenue, Room 1000, Portland, Oregon 97204 ■ Dan Saltzman, Commissioner ■ Dean Marriott, Director

BES Tree Code Option April 27, 2010 Draft

March 22 Memo to PC/UFC

Support

- Uniform permit – for simplicity and consistency, no residential exemption
- Tree regulation trigger size of 12” DBH – opposition to triggers at or greater than 20”
- Public capital projects and public works permit flexibility in consultation with Urban Forester (via programmatic permit)
- Tree density and preservation standards
- Proposal to balance nuisance tree removal and replacement with non-nuisance

Requested modifications

- Revisit use of significant tree list (18 trees) in environmental and land division reviews
- More grove protection – 12’ trees and understory
- Tree for tree mitigation of street improvement projects – no exemptions

Continuing Issues

1. **Need for a tree hierarchy as part of preservation standard.** The public draft is written in a way that it could be interpreted as a hierarchy, but is actually a menu of options (i.e. preserve, plant, or pay) reliant on incentives to create the preservation preference. BES advocates a code or administrative rule specifying a hierarchy of preservation first to the degree possible, requiring movement of structure footprints around the site (as allowed by current codes) to avoid tree root protection zones. The next option would be mitigation on-site, on street frontages, or off-site. Last would be payment in lieu of preservation or mitigation.
2. **Offsite mitigation “in-lieu of” fees appropriate to development types.** Development proposals and those absent development, and homeowners and commercial business applicants must be sized to instigate appropriate mitigation. A two- or three-tiered in-lieu of mitigation fee system, providing credit for meeting part of the 35% preservation standard, is needed to reflect the economics of the various scenarios.
3. **Limited priority tree list** – The currently proposed priority tree list used to determine which trees due to their slow growing nature should be protected down to 6 inches in diameter only contains oaks and madrones. A broader list is needed to reflect the diversity of smaller, native trees.
4. **Implementation costs for comprehensive City inspections.** Urban Forestry (UF) inspection of every tree site is expensive and is likely to duplicate contractor and arborist services already required and available for property owners. UF’s expertise should be reserved for the most important and technically complicated cases. The City should establish a program of landscape contractors certifying code compliance on the simplest permits, arborists certify the next tier, and Urban Forestry reviews of the largest/most sensitive trees and all appeals. UF spot checking would guarantee the validity of professional certifications.
5. **Need for additional public comment and involvement.** Changes to the options now under consideration warrant additional public review and opportunity for public comment.

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BES Option

The BES option modifies a recent BPS simplification proposal. In general the BES option incorporates the following changes:

1. **Institute a preservation hierarchy for development situations.** Require consideration of changes in building footprint location, and encourage alternative designs and construction practices for tree preservation. See table on the next page and flow chart on last page.
2. **Develop a tiered offsite in lieu of fee.** The goal is to favor onsite tree preservation, or on-site mitigation where preservation isn't possible. To support that goal two tiers of in-lieu fee are suggested: Tier one (\$600 per tree, to be determined) matches the current residential non-development fees, and applies when there is onsite tree preservation less than the 35% standard. Tier two would apply where less than half the 35% standard can be met, doubling the tier one fee. Development proposals would have a significant incentive to preserve trees on-site.
3. **Add review of a more comprehensive priority tree list.** Discuss modification of the existing 18 significant trees list and adding groves criteria for application during resource-related (E-zone, Greenway, Pleasant Valley, etc) and land division reviews.
4. **Use self-certification to reduce Urban Forestry inspection costs to the City.** Self-certification would rely on landscape contractors to confirm type A permit information, arborists to assess type B permits, and Urban Forestry staff to concentrate on inspection for Type C permit, appeals and spot checks of A & B permits.
5. **Use Neighborhood Tree Stewards (NTS) to provide education, referrals and compliance checks.** The City could identify the local tree steward on A and B permits to make them available to identify information and help property owners choose the right tree for the right place. These educated neighborhood advocates can help meet the "face to face" discussion need highlighted by Forestry without the cost of a Forestry site visit. NTS already see themselves as auditors of tree cutting.

BES Option Summary

Main Activity in BPS Proposal (4/9/10)	BES Modification	Cost Effect*	Canopy Effect**
LAND-USE REVIEW			
Tree preservation criteria applied in LU reviews	Add significant tree list (18 trees) to review for E-zone and other resource-related areas	+ 127 hours ¹	NO CHANGE
DEVELOPMENT SITUATIONS			
Tree Preservation Standard	Hierarchy requires consideration of alternative site layouts, and requiring first preservation, then mitigation, and finally payment in-lieu.	+ 4,114 hours ²	A 40% ³ increase adding 17 acres.
Tree Density	NO CHANGE		
Property Line Trees	NO CHANGE		
E-zones	NO CHANGE		
Capital Projects	NO CHANGE		
TREES IN NON-DEVELOPMENT			
Uniform Permit	Use Self Certification for UF inspections. NTS provides education.	- 9,886 hours ⁴	NO CHANGE
Pruning permit	NO CHANGE		
Programmatic Permit	NO CHANGE		
Requirements for Dead Dying, Dangerous	Place detailed criteria in Admin Rule		
CUSTOMER SERVICE IMPROVEMENTS			
Single Point of Contact	NO CHANGE		
After Hours Response Line	Notification of NTS on permits, reduces some calls.	- 42 hours ⁵	NO CHANGE
Community Tree Manual	Use internal staff resources over a year long process with limited edit budget (10k) Scope still in discussion.	- \$100,000 to 200,000	
Permit Tracking System	Include NTS and NAs in permit approval notices.	+ 508 hours ⁵	
Neighborhood Tree Plans	NO CHANGE		

* Costs estimated based on February 26, 2010 spreadsheet numbers.

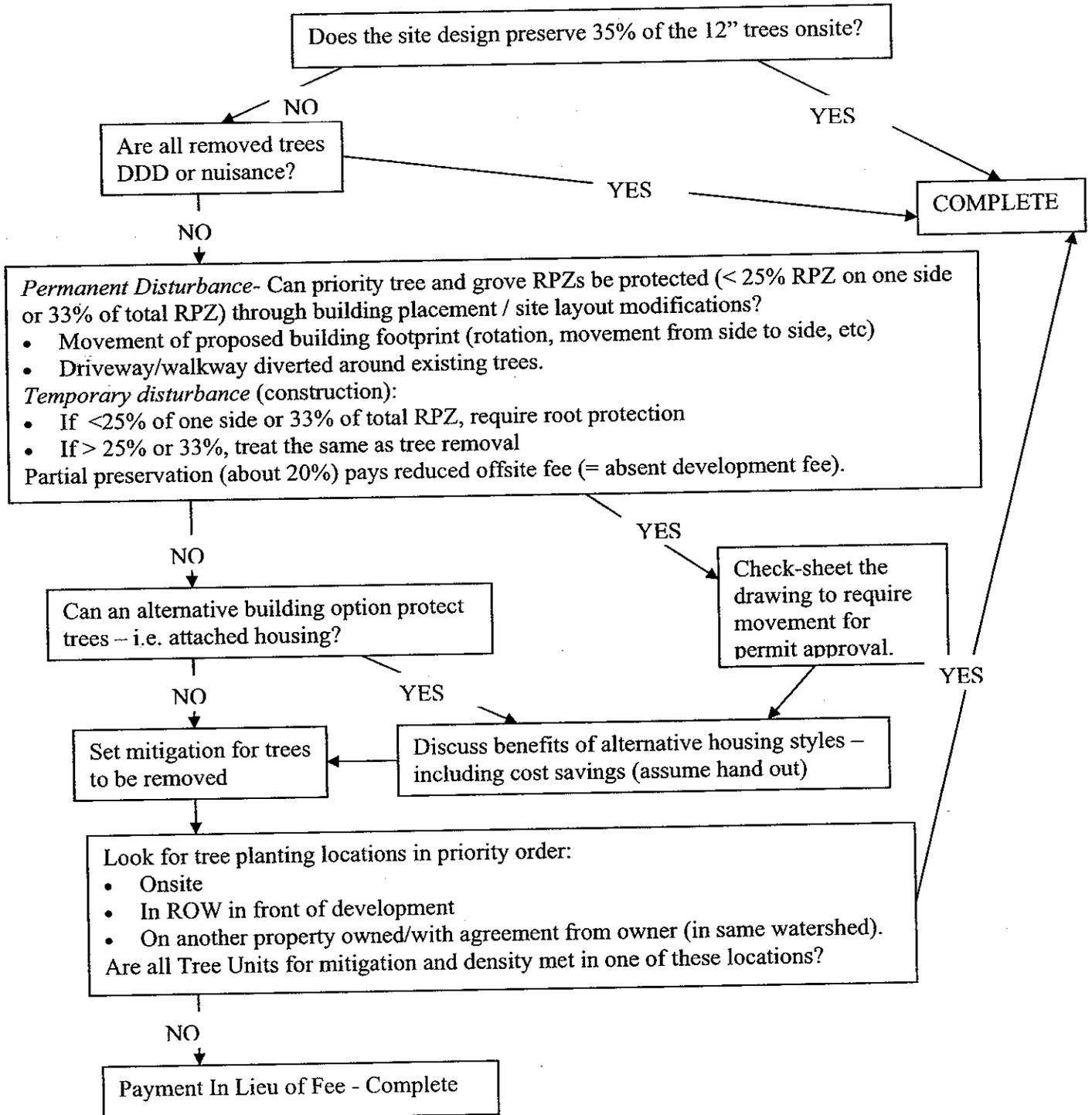
** Canopy changes based on April 9, 2010 Canopy benefit chart.

- 1 Assume 0.5 hours added per review case for LD and Tree reviews. 242 LD cases + 14 Tree Review cases = 254 x 0.5 hours = 127 hours
- 2 Start with 4,841 cases with 0.25 hours added for additional initial review = 1,210.25 hours. Assume conservative 40% expected to need redesign at 1.5 hours for each case to coordinate needs for redesign and re-submittal of revised plan. 1,936 cases x 1.5 hours = 2,904 hours.
- 3 Start with 4,841 cases which preserve 44 acres or 0.0091 acres of tree per case. BES assumes that represents likely 10% of cases who choose to retain site trees (assume 90% pay full off site mitigation). BES proposal requires 40% of sites to do redesign (1,936 cases which would save an additional 17.6 acres or a 40% increase in acreage.
- 4 Self cert assumes landscape contractor for type A permits, certified arborist for type B permits and UF for type C permits Keep UF on 40% check of LU and 10% check of Building and absent development permits and on appeals processing (the largest time load predicted). For absent development look to 12" uniform permit summary and pull out DDDs (66+123 = 189) that could be subject to professional determinations (this does not account for healthy nuisance trees). These trees could be permitted under and online applications with professional certification. Form spreadsheet assume 242 LU+68 CU/DZ+ 224 AD+ 34 EN/GW cases = 568 cases total (keep UF on TR cases). Assume 60% inspection savings or 341 cases. Use 4,841 building permits assume 90% time savings = 4357 cases. Add in 90% time savings for absent development DDD cases and type B cases (not DDD) of 83 cases = 245 cases saved. Add all cases that could be professional certifications: 341+4,357+245 = 4,943. Use UF 2 hours per site visit and assume one site visit per case = 9,886 hours saved.
- 5 Assume main work in on building permit and A & B absent development cases. There are 4,841 building permit cases and 236 A & B permits absent development. Assume 0.10 hours per cases to add Neighborhood Tree Stewards (NTS) info to permit approvals and to send e-mails to NTS & NA groups = 508 hours. BES original cost estimate for hotline responses assumed 33% of cases general a call or 167 calls. Assume calls need at 0.5 hours each = 83.5 hours. Assume NTS reduce those calls by half – saving 41.75 hours.

EXAMPLE TREE DECISION HIERARCHY

April 27, 2010 Draft

Looking at 35% preservation standard:



Determining Compliance with the 35% Standard

Projects shall be deemed in compliance if:

- The root protection zones of 35% of the 12" or priority trees are completely outside of the building coverage footprints; if not then
- The building foot prints only encroaches into less than 33% of the total RPZ for any 12" or priority tree – confirmed by arborist visit; if not then
- The building foot prints only encroaches into less than 25% of the RPZ for a single side of any 12" or priority tree confirmed by arborist visit; if not then
- Preserves to maximum extent practicable (MEP) 12" and priority trees present on site (less than 35% standard) and mitigates for the remaining tree preservation load.

Determining Preservation to Maximum Extent Practicable

Staff shall determine whether a site design has preserved to MEP based on the following:

- Site *has utilized all* applicable flexible design standards allowed in the zoning and Tree Code (assume Title 33 issues would already be in a review situation):
 - Move sidewalk or street around trees in proposed ROW.
 - Lengthen pedestrian connections
 - Preserved trees (in clumps or rows) within ultimate required landscaping, buffer or screening areas.
 - Moved required outdoor area in front of the building.
 - Reduction to required parking.
- Site changes *will not trigger*:
 - Any change requiring an adjustment, most common to avoid:
 - Encroachment into setbacks
 - Front door placement relative to street
 - Building wall window coverage
 - Building / wall height – from pushing a building to a steeper sloped portion of the lot.
 - Movement into a steep sloped area (>20%). If already in a steep slope area, modification can be made.
 - Significant increase in the amount/cost or extent of foundation work – not sure how to get at this.
 - Problems with vehicle egress to or from property – i.e. not remove requested turn around area.

Process

1. Applicant submits plan for review
2. City staff reviews to see if 35% standard met (already in assumed costs)
3. If 35% not met, reviewer evaluates use of flexibility standards and avoidance of adjustments/slopes/etc. Assume add 30 min per case.
4. If potential to relocate or modify building design (guess at 40% of sites), then check sheet back to applicant. Assume 1.5 hours to work with applicant for re-submittal.
5. Applicant resubmits a plan that can be approved.

Hamilton, Joan

From: Christine Colasurdo [c.colasurdo@yahoo.com]
Sent: Tuesday, April 13, 2010 2:22 PM
To: Planning Commission
Subject: Portland trees

Hello Portland Planning Commission:

I couldn't make the hearing today but wanted the commission to know that as a resident of Portland I strongly support a new, improved, and stronger plan for Portland's trees. I strongly support regulations that would require a permit for removing trees 12 inches or larger in diameter on private property regardless of the lot's location or size. In just the last two years I have witnessed 4-5 large trees removed in my neighborhood alone.

I fully support strengthening city regulations so that Portland has an educated citizenry as well as a healthy, large and thriving urban forest.

Thank you.

Sincerely,
Christine Colasurdo
2776 SW Old Orchard Road
Portland, OR 97201

T.53



APR 27 2010

Home Builders Association
of Metropolitan Portland

April 27, 2010

Portland Planning Commission
City of Portland
1900 SW 4th Ave.
Portland, OR 97201

Re: Citywide Tree Policy

In follow up to the testimony HBA provided to the Planning Commission on March 23, we have been working both internally and in meetings with various stakeholders to provide ideas on how to address the issues at hand.

Our belief is that the challenge before the Portland Planning Commission and the Urban Forestry Commission is to consolidate the existing tree regulations into a cohesive, simple regulatory package and amend the proposed regulations in a way that will result in the ongoing development of a strong tree canopy in Portland while balancing other City goals.

As has been pointed out, the proposed regulations need to be radically simplified. As proposed, they fill up two thick binders. They need to be greatly simplified so that users of these regulations can understand them and to lower administration/implementation costs for the City and property owners. As currently proposed, the costs would be too great to rely solely on fee revenue (or fees would be too high, and would act as a disincentive for people to get permits). The program as proposed would need to be heavily subsidized by the General Fund, and this is not feasible given the City's financial situation.

In addition, we want to reiterate the major concerns we expressed in our letter on March 23, namely:

- Ensuring that a strong tree canopy continues to develop over time is a different goal than simply preserving existing trees. While mature trees have value, our belief is that the policies need to provide more flexibility and focus on the long-term goal – ensuring a healthy tree canopy continues over time.
- Portland's overall tree canopy has not suffered under the existing tree policies. There are very few examples of violations of tree codes by the development/building community over the years. In fact, there are many examples of neighborhoods whose tree canopy was significantly improved (e.g. Eastmoreland and Laurelhurst) as a result of being developed.
- We believe almost no consideration has been given to how these proposed policies would impact several other City and Metro regional goals, including the large amount of housing units anticipated through infill and redevelopment over the next 20-30 years in order to grow more

Home Builders Association of Metro Portland
15555 SW Bangy Rd., Ste. 301
Lake Oswego, OR 97035
503-684-1880 • Fax 503-684-0588

pg. 1

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densely. However, there are other needs and desires that should be considered and that the policies should provide flexibility to achieve. Solar energy impact, insurance requirements, and personal preferences for shade/sun on a lot are all important considerations.

- The policies need to provide clear and objective standards. For example, having a hierarchy (e.g. first option preserve, second option plant, third option pay) means an applicant would have to first show that it was not practicable to preserve a tree, before they could move on to the next step of planting new trees, and then the applicant would have to show it was not practicable to plant the new trees before they could go to the payment option. Land Use law draws a sharp line between standards that are clear and objective, and standards that involve discretion. To require that a tree be preserved if it is "practicable", is discretionary. The reason this is important is that if discretion is used, than a Land Use Review is required. It makes no sense to send every Building Permit application through a Land Use Review to consider if tree preservation was practicable or not. It is critical to keep the standards clear and objective, and not introduce discretion at the Building Permit stage.

As an alternative to the proposed tree regulations, HBA would like to suggest that the City review its current "T1 standard" (33.248.020.H, shown in Addendum to this letter) and consider the following:

1. Currently the T1 standard only applies to new single-dwelling development in single-dwelling zones, multi-dwelling zones, and commercial zones. This is a standard that people can understand, and are familiar with. There were no specific tree regulations before the T1 standard went into effect several years ago. There has been no evidence provided to show that this standard is ineffective, and it can be assumed that the standard has resulted in some increase in tree preservation and tree planting (either on site or through the Tree Fund).
2. Propose that the T1 standard be expanded to apply not just to single-dwelling development but to all "New Development" in Single-dwelling, Multi-Dwelling, and Commercial Zones. ("New Development" is defined in the zoning code as, "Development of a site that was previously unimproved or that has had previously existing buildings demolished.") In other words, it would apply if you were doing a single-dwelling, multi-dwelling, or a commercial development. *There needs to be an exemption for lots that are in zones that allow 100% building coverage, since the City's intent with these lots is that they be fully built out.*
3. Modify the T1 standard to allow any tree planted for code/regulatory reasons on a lot (e.g. street trees, trees for storm water mitigation) to count towards the T1 requirement. This is especially important on small lots (5,000 sq.ft. or less), where preserving/planting trees is extremely difficult already due to building footprint, setback and other considerations.
4. If there is some desire to preserve existing mature trees as an added value to our overall tree canopy, than provide incentives to accomplish this. One suggestion would be to provide a credit towards a stormwater SDC or fees for any trees beyond a certain diameter that are preserved on an existing lot.

The advantages of modifying/adapting the "T1 standard" are several. The standard is simple to explain, and easy to understand, and contains clear and objective standards. It provides certainty to property

owners about what their options are, while at the same time provides the flexibility needed for different situations, while keeping the costs of administration down. We would have an increase in preservation of trees, tree planting, and payment into the Tree Fund simply by expanding these requirements to apply to more situations.

One last comment. Our understanding is that the policies as currently proposed would require the City to spend between \$1.5-\$2.0 million annually to administer. There are organizations out there (e.g. Friends of Trees) that could help coordinate neighborhood tree plantings and really encourage certain areas with lower tree canopies to plant and develop trees. The City could likely achieve far greater success in enhancing tree canopies in existing neighborhoods if it just took one-third of the proposed budget and put that towards the purchase of trees for neighborhoods to use as part of these efforts. This would be much simpler, require less money, and would achieve a far greater benefit than simply adding to the administration layers within City departments.

Respectfully,

A handwritten signature in black ink, appearing to read 'D. Nielsen', with a long horizontal line extending to the right.

David Nielsen
Chief Executive Officer

ADDENDUM

Existing Zoning Code Language commonly known as "the T1 standard" (Zoning Code Section 33.248.020)

H. T1, trees.

1. Intent. The T1 standard is a tree requirement for new residential development. It encourages the retention of trees, minimizes the impact of tree loss during development, and ensures a sustained tree canopy in Portland.
2. Tree requirement. This requirement may be met using any of the three options below. The applicant may choose to meet one or more of these options. Adjustments to this Subsection are prohibited. The options are:
 - a. Tree preservation. At least 2 inches of existing tree diameter per 1,000 square feet of site area must be preserved. On lots that are 3,000 square feet or smaller, at least 3 inches of existing tree diameter must be preserved per lot. This standard may be met using trees on the lot and within 5 feet of the edges of the lot. Trees within public and private rights-of-way may not be used to meet this standard. When this option is used, a tree preservation plan is required.
 - b. Tree planting. At least 2 inches of tree diameter per 1,000 square feet of site area must be planted. On lots that are 3,000 square feet or smaller, at least 3 inches of tree diameter must be planted per lot.
 - c. Tree Fund. This option may be used where site characteristics or construction preferences do not support the preservation or planting options.
 - (1) Fund use and administration. The Tree Fund fee is collected by the Bureau of Development Services and is administered by the Urban Forestry Division of the Bureau of Parks and Recreation. The funds collected will be used to plant trees on public or private property in the same watershed as the site.
 - (2) Calculation of required fund contributions. Applicants must contribute the cost to purchase and plant trees, as set out in (3), below. The cost to purchase and plant trees will be adjusted annually as determined by the Urban Forester based on current market prices per inch for materials, labor, and maintenance.
 - (3) Required fund contribution. The applicant must contribute the following to the Tree Fund before a building permit will be issued:
 - For lots with 3,000 square feet or more of area, the cost to purchase and plant at least 2 inches of tree diameter per 1,000 square feet of site area; or
 - For lots with less than 3,000 square feet of area, the cost to purchase and plant at least 3 inches of tree diameter per lot.

April 12, 2010

City of Portland
Attention: Planning Commissioners
Portland Planning Commission/Urban Forestry Commission
1900 SW 4th Avenue, Suite 7100
Portland, OR 97201

Re: Comments on Proposed City-wide Tree Policy and Regulatory Improvement Project

Dear Commissioners:

Thank you for the opportunity to provide comments on this process. We had the opportunity to be apart of the stakeholder sessions in which staff presented and discussed several tree-related issues. We would like to offer the following comments on the proposed code to address tree protection/preservation. While the following is not an exhaustive list, we thought it would be important to highlight some of the issues for your consideration.

Our comments are mainly focused on impacts related to properties and users of industrial or employment zoning designations as these users have unique development characteristics which are relatively inflexible.

Although we support tree protection/preservation, we believe the proposed code language has the potential for significant impact to not only existing and future users, but also to BDS staff when they attempt to implement the proposed regulations. Since a new code title and amendments to several other titles are proposed (over 500 pages not including appendices), it is imperative that code language is closely examined by the reviewers and the users to ensure it is properly interfaced and does not result in unanticipated regulatory constraints/conflicts.

In addition, the Project Overview in Volume 1 (Chapter 1) mentions possible future measures to make, "...tree related information and regulations more user-friendly..." and one of the recommendations is a, "...new Community Tree Manual." With the extent, detail, and complexity of this proposed code language, we question why the tree manual concept was not part of the current program. A tree manual approach, similar to a stormwater manual, would help to provide much more flexibility and best management practices that cannot be accomplished by a rigid zoning code that is subject to strict land use review procedures. If funding is not currently available to implement the tree manual, it seems a possible result is non-user friendly regulations until the funding is in place. Our concern is that the City cannot contemplate enough code to address the numerous situations that arise with trees. With the amount of code changes currently proposed, it seems less code combined with a tree manual and best management practices is a more appropriate approach for tree protection/preservation. It is our assumption the City of Portland would want to be perceived as having the most advanced/creative code rather than the most lengthy.

With many private and public agencies facing limited staff resources and a relatively short period to review this public draft, we feel additional public review time is necessary to ensure unnecessary regulatory reviews and/or requirements do not occur that would add to the economic difficulties facing new development. There appears to be numerous potential situations where trees would need to be

T.55

evaluated and it is difficult for us to identify all situations without thorough review of the draft code, review with City staff, and, preferably, input from development and environmental professionals. Therefore, we request consideration of an extended public review period to solicit public input/comments followed by another public hearing before this joint commission prior to the Commission making recommendations. In the event this request for additional review time is not granted, we have provided a preliminary summary of our comments (outlined by proposed code section) below.

I. PROPOSED TITLE 11 CODE COMMENTS

1. *Proposed Code: Introduction (Table 1)* *"Private Trees" and "Development Trees"*

Comment: Although it appears this is explained in more detail in later sections, the difference between "Private Trees" and "Development Trees" may result in confusion, since most trees involved with development will be on private property. In addition, there is no definition of just "Development" (e.g., "...when specific types of development are proposed") in Title 11.

2. *Proposed Code: Introduction (Table 2)*

Comment: This chart is helpful, but the difference between "Other Activity" and "Development" is unclear. Also, "Development" is not defined, and it is not clear how development applies to "Street" and "Resource." It is not clear if this means that in addition to environmental review required for disturbance in an e-zone, for example, that a tree permit review will also be required. A possibility would be to indicate on this chart what type of tree permit (i.e., A, B, or C) is required for each activity/location.

3. *Proposed Code: 11.100.030 Code Administration and Duties Performed*

"This Title is primarily implemented by two City officials; the City Forester and the Bureau of Development Services (BDS) Director. The City Forester is responsible for Street Tree development requirements and administering the rules affecting other trees when not associated with a development project. The BDS Director is responsible for ensuring compliance with Title 33 overlay and plan district requirements as part of the tree permitting program, and land use and development approval requirements as part of the development process. In addition to the City Forester and BDS Director, the City Engineer has a role as further described below in the resolution of infrastructure conflicts within the public rights of way and city-owned easements."

Comment: This section exemplifies the concern we have regarding the complexity of the code and how (and by whom) the review of tree applications will occur. This section indicates the City Forester and BDS Director will oversee these regulations, which results in oversight by two separate bureaus. In addition, the City Engineer, who is in a separate bureau (PBOT), is also involved when trees are in rights of way and public easements. In addition, the bureau responsible for preparing this code is a separate bureau (BPS), which is not a reviewing agency.

4. Proposed Code: 11.100.040 (1-3) Hierarchy of Regulations (D. Relationship to Title 33, Planning and Zoning)

Comment: We are not aware of another situation in City code where two titles (i.e., 11 and 33) are so closely referenced and connected. We are concerned there will be conflicts between the two titles and this will complicate review/implementation.

5. Proposed Code: 11.100.090 Tree Planting and Preservation Fund

"B. Calculating the in-lieu fee rate. The fee in lieu of planting or preservation will be calculated to fully cover the cost of planting a new tree. Such cost includes materials and labor necessary to plant and maintain the tree through a two year establishment period. This cost will be reviewed annually based on current market prices per inch for materials, labor, and maintenance, and compared to costs paid for planting trees in the previous year. The required payment will be set forth in the City's adopted fee schedules."

Comment: Since maximum flexibility is needed for projects in industrial/employment zones, this code section is critical since it is likely that payment of an in-lieu fee will be necessary in many instances. Therefore, the amount of fee is a primary factor, and our concern is the fee will be established at a high rate to discourage using a fee in-lieu option. As an example, the rate once utilized by the City for fee in-lieu for trail construction in the Columbia South Shore project was significantly higher than the actual cost if installed by a private party. A process for establishing a fair in-lieu rate is critical to the success of this option, and the success of development in employment/industrial zones where trees are involved. Lastly, a process that establishes public oversight (e.g., by Urban Forestry Commission) for a priority/timeline for spending the funds is critical.

6. Proposed Code: Chapter 11.300 Permit Procedures

Comment: We are very concerned about the additional cost and time associated with obtaining permits for the numerous development projects, as well as the on-going maintenance that occurs on Port property. We strongly recommend a streamlined permit process be established for large property owners such as the Port. This streamline permit process could be similar to the City's popular Facilities Permit Program, and could allow those property owners to apply under a separate streamlined review process (and private utility providers, etc.), particularly those who include trained staff and face on-going tree-related issues. Possibly, this streamlined facility-type permit could be addressed through an expanded "programmatic permit" as provided in Section 11.300.070 for public agencies.

We are also very concerned that the timeline for a decision for Type A, B, and C permits is not specified. The commentary in this section indicates, "...the implementing Bureaus have expressed concern having these timelines in code," yet appeals of such decisions must be filed within 14 days. It is not sufficient to indicate in the commentary, for example, that "Type A permits are intended to be processed quickly,..." As indicated above, it is not clear what measures are in place to ensure the three bureaus involved in tree reviews can actually process simple permits in a timely manner.

Lastly, it is also unclear how current agreements with the City regarding special planting standards in/near the airport will be affected by this proposed code.

7. Proposed Code: Chapter 11.600 (Table 600-1) Applicability of Tree Standards in Development

Comment: The threshold of \$25,000 for additions and alterations is not realistic (i.e., too low). It is quite possible the requirement to plant trees could approach the cost of the minimum threshold in the code (i.e., \$25,000), depending on the amount of street frontage, need for tree wells, etc. It is also unclear why protection and preservation standards apply to every permit type, regardless of whether the requested permit was for interior alterations or zoning permits, for example, that do not result in site disturbance.

8. Proposed Code: Chapter 11.600 Trees In Development Situations (Exemptions) "D. Emergency Tree Pruning or Removal"

Comment: It is unclear why emergency tree pruning is listed under exemptions in the Trees in Development Situations section.

9. Proposed Code: Chapter 11.600.050 Tree Plan Submittal Requirements

Comment: The detail required for a tree plan submittal, which is required for all development permits, seems excessive considering some permits may not include exterior work. It is likely the level of detail requested for a tree plan could not be prepared accurately unless a topographic survey is accomplished, which may not be warranted. Once again, there should be a reasonable approach to requiring tree plans and review for projects that may not include work that impacts trees.

10. Proposed Code: 11.600.060 (A-3) Tree Preservation Standards, and Table 600-6 Tree Density Standards for site and street trees

Comment: We are very concerned with the Replacement Tree Specifications, and particularly, the standards of Table 600-6. This table requires one site tree unit per 1,000 SF of "development impact area" or 15% of site area. Typically, industrial development (which we assume also includes employment uses) would result in disturbance of 85% or more of the site, depending on how much grading is required to provide a suitable building pad. We do not understand the relationship of this tree replacement requirement to the number of trees that are impacted. For example, it appears if one tree or 50 trees are being removed, that the one per 1,000 SF standard applies based on 15% of site area, or the amount of development impact area. Therefore, regardless of the number of trees removed, for a five-acre site, it is likely 33 tree units could be required to be provided, which appears to be in addition to trees already required for parking lots and perimeter landscaping. Using the City's figure of \$300 per 1/3 tree unit, this would result in \$29,700 replacement cost for removal of only one tree on the site.

Regarding street trees, for example, we will use a \$25,000 interior alteration on a five-acre site with a 450 LF street frontage (assuming no corner lot). This example could result in planting of 18 street trees. Assuming \$500 per tree, this could result in a \$9,000 street tree requirement for a \$25,000 project (in addition to other permit costs).

As a general comment, this chapter appears to include code that is difficult to understand and does not appear to have a clear relationship between tree removal and replacement. The commentary is not clear on how these limitations (i.e., 15%, one unit per 1,000 SF, etc.) were established. Lastly, the reference to 11.600.060.A.2.c in the footnotes of Table 600-6 appears to be an error.

11. Proposed Code: Chapter 11.800 General Terms

Comment: We have concerns regarding definitions for "Development Impact Area" as it relates to industrial/employment uses, as frequently an entire site may be disturbed to accommodate a project (except for resource areas). This is due to the need for flat areas for industrial buildings, and the grading and filling that must occur. We question that this definition is necessary as it relates to tree replacement, but may be useful if only a portion of an undeveloped site is proposed for development.

We are also concerned with how a "grove" will be determined, since the definition includes terms such as, "...that form a generally continuous canopy over a non-linear area, or where tree spacing is generally characteristic of that species or species assemblage."

II. PROPOSED TITLE 33 CODE AMENDMENTS

1. Proposed Code: 33.140.240 (B-1-A-1) Pedestrian Standards

"Where a Priority Tree proposed for preservation, or its root protection zone, is within the straight line path, the path may meander to avoid the tree or root protection zone and may be up to 150 percent of the straight line distance."

Comment: Although the application of pedestrian standards is limited within Port property, we feel an increase of only 30% to meander around a tree/root zone is not adequate. We recommend at least 50% (i.e., total 200%) to allow adequate flexibility to accommodate trees.

2. Proposed Code: 33.248.030 (D-1) Plant Materials

"Existing vegetation. Existing vegetation except those plants on the Nuisance Plants List may be used to meet the standards, if protected and maintained during the construction phase of the development, as specified in Section 33.248.065. If existing trees are counted as follows: used, a. Each tree between 1.5 inches and 6 inches in diameter counts as ½ tree unit; b. Each tree greater than 6 inches up to 12 inches diameter counts as 1 tree unit; c. Each tree greater than 12 inches up to 20 inches counts as 2 tree units; and d. Each tree greater than 20 inches diameter counts as 3 tree units."

Comment: It is unclear how existing trees required by City code for previously developed parking lots, etc. will be counted for non-conforming upgrade requirements (or if partial redevelopment is proposed). For example, if the perimeter landscape requirement is one tree unit per 30 LF, but an existing landscape area currently includes trees that are less than 6" in diameter (but met code at time of planting), it is unclear if it is necessary to plant additional trees since the applicant would only receive credit for ½ tree unit. It is unclear what the case would be if the current density and spacing do not allow additional trees to be planted.

3. Proposed Code: 33.248.060 Landscape and Tree Plans

"For the purposes of meeting Chapter 11.600, Trees in Development Situations, a Tree Plan must be submitted showing the trees on site to be retained and methods for their protection, trees to be planted to meet Tree Density requirements and street trees to be protected and planted. Applicants may submit a combined Landscape and Tree Plan, when all of the information can be shown in a clear and legible manner. Tree Plan requirements that apply at the time of land use review are specified in Section 33.730.060."

Comment: We are concerned that the extent of area that a tree plan must include is not clear. For example, if only a portion of a large site is being developed or redeveloped, then it is unclear what

assurance would be provided in the code that an unnecessary survey/inventory of existing trees on the entire site would not be required.

4. Proposed Code: 33.258.070 D-1 and D-2) Nonconforming Development

"a. Landscaping required for the following areas:"

"Tree density standards of Chapter 11.600"

Comment: As noted above, it is not clear if this means that anytime the non-conforming upgrade threshold is met, that the number of tree units must be recalculated and complied with each time a permit is requested.

5. Proposed Code: 33.266.110 (B-4) Minimum Required Parking Spaces

"Exceptions for sites where Priority Trees are preserved. Minimum parking may be reduced by one parking space for each Priority Tree preserved and protected in accordance with the requirements of Title 11, Section 11.600.080. A maximum of 2 parking spaces or 10 percent of the total required may be reduced, whichever is greater. However, required parking may not be reduced below 4 parking spaces under this provision."

Comment: Although we appreciate the ability to reduce minimum code-required parking, it is more common that the amount of parking in commercial/industrial development is based on market need or user requirements that exceed minimum requirements.

6. Proposed Code: 33.430.080 (7-b) Items Exempt From These Regulations

"Dead, diseased, or dangerous trees or portions of trees when they pose an immediate danger, as determined by the City Forester or an arborist."

Comment: It needs to be determined what type of approval is needed for removal of these trees, or if only having an arborist report available, if needed, is sufficient.

7. Proposed Code: 33.430.080 (8) Items Exempt From These Regulations

"Pruning trees, when conducted under an approved tree pruning permit as required by Title 11, Trees..."

Comment: We are concerned about the cost, delays, and unnecessary review required for a tree pruning permit for any pruning.

8. Propose Code: 33.430.130 (B-5) Permit Application Requirements

"A Tree Plan, meeting the requirements of Title 11, Section 11.600.050, must be provided. The plan must indicate trees proposed to be retained, trees to be removed, location and methods of tree protection, and quantity of small, medium and large size trees to be planted; and.."

Comment: As indicated in II-3 above, the extent of a tree plan requirement is not established.

9. Proposed Code: 33.430.150 (E) Standards for Utility Lines

"Native trees more than 10 inches in diameter may not be removed.;"

Comment: Since the tree replacement code has been refined, we feel the limit on tree size should be increased (to at least 18") if the replacement requirement is met. The ability to relocate/replace utility lines is not always possible due to grade and other issues, and sometimes there are situations where removal of one larger tree could result in preserving a larger grove of smaller (i.e., under 10") trees.

10. Proposed Code: 33.430.175 Standards for Right-of-Way Improvements

"Trees within the right of way may be removed within the improvement area and within 10 feet of the edge of the right-of-way improvement. In no case may the combined total diameter of all the 6-inch and larger greater native trees cut exceed 225 inches."

Comment: The threshold of 225" is arbitrary, and has no relationship to the size of the site. In addition, most frequently, the requirement for right-of-way improvements is established by the City, placing the applicant in a difficult position.

11. Proposed Code: 33.430.180 (B) Standards for Stormwater Outfalls

"Native trees more than 10 inches and larger in diameter may not be removed;"

Comment: See comments above (II-9) regarding utility lines.

12. Proposed Code: 33.430.240 (1-b) Supplemental Application Requirements

"The existing conditions site plan must show the following for the entire site: b. Tree crown cover outline and generalized species composition, or trees 6-inches and larger identified by species."

Comment: Tree crown is very difficult and costly to identify, particularly on large sites with a large number of trees and no limit on which portion of the site must be inventoried.

13. Proposed Code: Chapter 33.440-Greenway Overlay Zones

Comment: We are not clear what the relationship is between proposed code changes in Greenway Overlay Zone and regulatory measures proposed with the River Plan project. It is unclear if the proposed code language for these two code projects has been reviewed to ensure the codes do not conflict.

14. Proposed Code: 33.508.314 Items Exempt From These Regulations (Cascade Station/Portland International Center (CS/PIC) Plan District) and 33.515.274 (N) Items Exempt from these Regulations (Columbia South Shore Plan District)

"Pruning trees, when conducted under an approved tree pruning permit as required by Title 11, Trees or when exempt from the Title 11 permit requirements."

Comment: As indicated in II-7 above, we are concerned about the cost, delays, and unnecessary review required by a tree pruning permit for any pruning.

15. Proposed Code: 33.630.200 Tree Preservation Requirements for Trees Located on the Site (TREES)

"2. Proposals to divide sites in C, E, or I zones where all of the proposed lots are currently developed with commercial, employment or industrial development have the option to defer tree preservation review to the time of any subsequent redevelopment of the site. If this option is used, the preliminary plan approval must be subject to a condition of approval that subsequent development permits are subject to the tree preservation standards of Title 11, Chapter 11.600; and"

Comment: We support this requirement, but we are not clear why there is an option to defer the tree preservation plan for undeveloped sites. Frequently, sites move through the land division process and the actual development (which would establish the trees that can be preserved and those that must be removed). Also, for existing developed lots, the proposed code indicates, "... where all of the proposed lots." It is not clear what the outcome would be if all but one lot in a subdivision is developed, and it is unclear if this means the deferral option is not available.

16. Proposed Code: Chapter 33.630 Trees

Comment: As a general comment, it appears this chapter is written for residential-type land divisions, but clearly applies to C, E, and I zones which is a concern. There does not appear to be any flexibility for undeveloped sites in C, E, and I zones. For example, Section 33.630.300 (Modifications that Will Better Meet Tree Preservation Requirements) provides modifications to site-related development standards as part of the land division review. However, the only standard listed applies to allowing reduction in minimum density, which does not apply to C, E, and I zone development. We recommend this section be modified to more closely address the conditions that exist with employment and industrial zones specifically, or allow more flexible options for compliance with tree requirements during a land division.

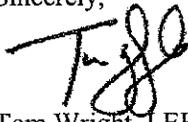
17. Proposed Code: Chapter 33.730 (F-1) Quasi-Judicial Procedures

"33.730.050 Pre-Application Conference 1. Preliminary tree assessment. A preliminary tree assessment involves a site visit by City staff to evaluate trees on the site and help set priorities for tree preservation. A preliminary tree assessment is required for Type III land division and planned development applications that have trees present on the site. The Director of BDS may require a preliminary tree assessment on a case-by-case basis for other review types if relevant to the approval criteria for the review. Preliminary tree assessments should generally occur in conjunction with the pre-application conference. Required assessments must occur prior to submittal of the land use application. A separate fee may be charged."

Comment: This step appears to be an unnecessary and costly requirement for a Type III land division. First, it is not clear from this requirement which staff will be involved, and if City staff have the qualifications to assess tree conditions and priorities, particularly if a separate fee is charged. We feel trees should not be treated any differently than other elements of development (traffic, wetlands, etc.), whereby an applicant's consultant can provide a tree assessment for review by City staff. Further, it is often premature to require this at the time of the pre-application conference, since the purpose of the conference is to review preliminary ideas and strategies prior to specific studies by consultants.

Thank you for the opportunity to present these comments. We are not opposed to the protection and preservation of trees, but feel extensive and complex code does not properly address the numerous situations that arise with trees, particularly in employment/industrial zones. We recommend consideration of less code combined with options such as a tree manual addressing best management practices. We look forward to continuing to work with City staff to review our comments if additional time is provided for public input.

Sincerely,



Tom Wright, LEED AP, AICP
Principal/Director of Planning

Hamilton, Joan

From: Greg Schifsky [gregschifsky@yahoo.com]
Sent: Tuesday, April 27, 2010 9:00 AM
To: Planning Commission
Cc: Jortner, Roberta (Planning)
Subject: Portland and its Trees

BOP,

Involvement by Portland citizens to protect remaining significant (priority) trees has gone on for probably 100 years, with the principles of The Japanese Gardens, The Rose Society and Festival, the Lewis and Clark world's fair exhibition, and more.

Back in 1989 an old logger of age 70 or so, explained to me that as a young man (1920s-30s), he couldn't understand the mentality of "there's no end to all these trees". Clearly, the administrators he spoke with were wrong as was the Forest Services' planting an incorrect species on both sides of the Cascade Mt. Range.

There is an end to Portland's significant tree skyline unless enactment of meaningful tree codes and regulations that preserve/protect trees is implemented by the City Council, and BDS along with full cooperation of all City Bureaus and interested parties.

You have already heard the lists of benefits that trees provide this, or any, city. A permanent exclusion of priority or large trees from Portland forever would alter healthy livability here. Forever.

Sincerely,

Greg Schifsky
4131 SW Lee St.
Portland, Oregon

4/27/2010

T. 56

**Written Testimony Submitted for PC / UFC hearing on
Citywide Tree Project**

Submitted for 5/11/10 record

	Name	Organization	Date
57	Bassos, Alex	HAND	4/29/10 (dated 3/23/10)
58	Esau, Rebecca	BDS	5/11/10
59	Fike, Jean	East Multnomah Soil and Water Conservation District	5/10/10
60	Gorlin, Lisa		5/6/10
61	Leggett, Nicole		5/10/10
62	Livingston, Peter		5/10/10
63	Livingston, Peter		5/11/10
64	Ross, Richard	Save Our Elms	5/11/10
65	Jenny Wadman		5/11/10

rec. 4/29/10



HOSFORD-ABERNETHY
NEIGHBORHOOD DEVELOPMENT ASSOCIATION

March 23, 2010

Roberta Jortner, City of Portland
Bureau of Planning and Sustainability
1900 SW 4th Avenue, Suite 7100
Portland OR 97201-5380

RE: Citywide Tree Policy Review and Regulatory Improvement Project

The Hosford-Abernethy Neighborhood Association (H.A.N.D.) is pleased to support the initiatives taken by the Bureau of Planning and the Forestry Division to articulate clear goals and policy directives aimed at improving urban canopy cover for the entire city. Neighbors have been frustrated by overlapping accountability, conflicting guidelines, and uneven compliance that plague the current system. By bringing all regulations and regulators together in one place, residents, businesses, developers, and other stakeholders can confidently make decisions concerning tree removal and re-planting.

The unified policies under the proposed Title 11 set measurable goals for canopy cover, and provide a regulatory framework that will help the City reach those goals. Additionally, we have confidence that the City and neighborhood associations will continue collaboration to find solutions and improvements that support both preservation and addition of trees to provide greater wildlife connectivity throughout the City and region, as well as the increase storm water and health benefits. We feel the goals outlined in the Tree Policy Draft can be accomplished while also providing opportunities for integration of solar arrays, and that the two are not mutually exclusive, but rather parts of the City's infrastructure.

In general, we believe that city policy that encourages the retention of large trees and educates residents concerning the benefits native species will enhance the livability of Portland for generations to come.

Sincerely,

Alex Bassos, HAND Chair

Cc: HAND Board, Matt Wickstrom, SE District Liaison

T.57



**City of
Portland, Oregon
Bureau of Development Services**

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MEMO

Date: May 11, 2010

To: Portland Planning Commission
Portland Urban Forestry Commission

From: Rebecca Esau, Manager, Land Use Services Division, BDS *RE*

CC: Susan Anderson, Paul Scarlett, Zari Santner, Dean Marriott, Joe Zehnder, Roberta Jortner, David McAllister, Stephanie Beckman, Morgan Tracey, Mary Wahl, Ross Caron, Ty Kovatch, Matt Grumm, Mike Liefeld, Douglas Hardy, Kimberly Tallant, Kim Freeman, Rob Crouch, Kathleen Murrin, Frank Krawczyk

SUBJECT: Citywide Tree Project

The Bureau of Development Services is in the process of having to cut an additional 17 positions this month due to our bureau's financial situation. This involves conducting layoff meetings with staff, dealing with union issues related to seniority and bumping rights, re-organizing the Divisions and Sections in the Bureau, training staff who have "bumped" into different positions, and developing plans quickly on how we will change our operations in light of the reduced staffing levels. For this reason, my staff and I are no longer able to participate actively in the discussions and development of further iterations of the proposed tree regulations. We believe with this memo, we have conveyed our issues and concerns and our recommendations. As you know we previously cut the size of the bureau by half, and this most recent phase of layoffs this month brings us to a new level that is even more challenging, and we are busy strategizing on how to even function, or offer the most basic essential services expected of a development bureau.

The situation is that our workload is too high relative to our staffing levels, and our revenue is too low to support even these inadequately low staffing levels. So to bring the staffing levels more in line with the low fee revenue coming in, we have to cut another 17 positions this month. But that results in an increased gap between the high workload and the remaining staffing levels. The fee revenues are down because of the type of work that is coming in (a lot of small projects) which have fees far beneath the actual cost of the service provided. And the large projects with high project valuation which would have helped subsidize the small projects, have all but disappeared. We are addressing this partially by bringing a proposal for fee increases to Council later this month, but it alone will not be enough to solve the bureau's financial and staffing situation, or the workload issue we face with inadequate staffing.

On May 6th, the Mayor released his proposed budget for fiscal year 2010-11. BDS had requested additional one-time and ongoing General Fund support for the Neighborhood

Inspections and Land Use programs and to allow the bureau to restore service levels by adding staff. Unfortunately, the Mayor did not approve our requests for additional General Fund support. This means that we will not be able to add positions back until we have sufficient revenues to afford them.

All of this is not your problem, but it is the reality of one of the two bureaus that will be on the receiving end of whatever tree regulations are adopted. We will be the bureau responsible for administering the tree regulations associated with development situations, including: public information, land use reviews, plan review and building permits, inspections, responses to complaints, and enforcement. Due to our situation, and growing backlog of work, not only can we not dedicate time to the further development of these regulations, we are again emphasizing the point that whatever the regulatory outcome is:

- a) It needs to be cost-neutral -- It is possible to get more trees preserved and planted without spending more money. Our recommendation on how to achieve this is included in this memo.
- b) The regulations need to be very simple -- The regulations need to be very simple so the public can understand them quickly and easily, and for cost-savings in implementation - we need regulations that can be explained and understood in a matter of minutes and that do not result in the need for more time during the plan review process. The three essential elements necessary to achieve the greatest compliance with regulations:
 - People are aware of the regulations;
 - People can understand the regulations because they are clear and very simple; and
 - The regulations are reasonable.

The two implementation bureaus, Parks and BDS, deal with the public and real situations every day involving trees. Collectively we have a great deal of experience with what works and what doesn't. I hope you will give great consideration and weight to what the Urban Forestry staff of the Parks Bureau suggests regarding trees in non-development situations and to what BDS suggests regarding trees in development situations. We are sincerely supportive of achieving the goals of the project, and want it to succeed, and we want more trees in the City. If the regulations are too complicated, or too expensive, or not practical, it is Parks and BDS that will be left with that, and will bear the full brunt of that every day indefinitely in our interactions with the public. So we are very interested in a workable, simple solution that will succeed on all levels.

The Bureau of Development Services proposes the following regulatory solution for trees in development situations. This is a solution that will be clear, and simple, and cost-neutral. It will also achieve:

- An increase in the number of trees preserved;
- An increase in the number of trees planted; and
- An increase in money paid into the Tree Fund, which will in turn result in more trees planted.

BDS' Recommended Proposal

We recommend the following the following regulatory approach for trees in development situations: Simply modify and expand the "T1 standard" that is currently in the Zoning Code (Section 33.248.020.H). Attached at the end of this memo is the current T1 standard from the Zoning Code and additional code sections describing where the T1 standard applies.

The T1 standard currently applies only to new Single-Dwelling Development in single-dwelling, multi-dwelling, and commercial zones. This is a standard that people understand and are familiar with. It is a menu that offers three options:

- Preserve trees;
- Plant new trees; or
- Pay into the Tree Fund.

The T1 standard has been a success in increasing tree preservation and tree planting in the City, and we recommend building on that success.

We propose that the T1 standard be expanded to apply not just to Single-Dwelling Development, but to all projects that increase building coverage on a lot in Single-dwelling Zones, Multi-dwelling Zones, and Commercial Zones (except on lots in the CX, CM, and CS zones, where the zoning is trying to achieve a more built-up urban form and greater building coverage of the lots.) By expanding it to apply to more than just new houses, and having it apply when someone increases building coverage, it will get triggered when someone proposes an addition, or a new detached structure such as an accessory dwelling unit (ADU) or a new garage, etc. as well as for all types of new development that add building coverage in the residential and commercial zones.

Also, it is our strong recommendation that the existing T1 standard for tree planting be modified slightly from 2 inches of tree diameter per 1,000 square feet of site area to one inch of tree diameter per 1,000 square feet of site area. The current requirement for 2 inches of tree diameter per 1,000 square feet of site area results in overplanting to a level that does not make sense, especially when the property owner is required to keep these trees alive to maturity and required to replace the ones that might die. For example, on a 5,000 sf lot, when you apply the current requirement for 2 inches of tree diameter per 1,000 square feet of site area, ten inches of tree diameter is required. The minimum size for broadleaf trees planted in residential zones is 1.5 inches. With the size requirement of 1.5 inches, the result is that seven 1.5 inch trees be planted. This is too much for a 5,000 square foot lot with a house, garage, driveway, etc. With our proposal of one inch of tree diameter per 1,000 sf of site area, 5 inches of tree diameter is required to be planted. This would result in 3.3 trees planted, and the Zoning Code requires that this be rounded up, so four trees would be planted. Four trees on a 5,000 sf lot is much more appropriate and reasonable than seven trees.

The Current Success of the T1 Standard

The following is some data on how the T1 standard has performed. We used a sampling of 100 permits for new single-family residential development from 2006, in a variety of geographic areas across the City. Six out of the 100 had Environmental Overlay Zoning on some portion of the lot. We excluded lots that had been created through the land division process because those would have had tree preservation requirements from the Land Division Review. We wanted to focus solely on the effectiveness and results of the T1 standard. Our findings are as follows:

Category	Data	Notes
# of permits with tree preservation	24 out of 100 (24%)	
# of permits with planting only	76 out of 100 (76%)	
# of permits with a combination of planting and preservation	0 out of 100	
# of inches preserved with preservation option	2,354 inches	# is low due to not having info on the additional trees that were preserved in Environmental Zone resource areas on the lots in the sample. The additional preserved trees aren't shown on the plans because there was no disturbance or construction in those areas.
# of inches required to be planted or preserved to meet T1 based on the lots in the sample	1,423	
# of Trees Planted to meet T1	328	
# of Trees Preserved	134	# is low due to not having info on the additional trees that were preserved in Environmental Zone resource areas on the lots in the sample. The additional preserved trees aren't shown on the plans because there was no disturbance or construction in those areas.

Additional data from the 100 residential permits sampled from 2006:

- Two-thirds of the tree preservation occurred on the west side of the City, and one-third on the east side of the City.
- From aerial photos, approximately 90 of the 100 lots likely had trees prior to development, but this is not certain from just looking at aerial photos.
- Of the 100 lots in the sample, 58 of them are less than 5,000 sf in area. Of these lots, three of them preserved trees. This confirms that it is very difficult to do tree preservation on lots less than 5,000 sf. If it could be done, people would do it, since it is expensive to cut down a tree, and developers know mature trees add value to a lot with a new home.

The sample included lots of varying sizes ranging from 2,165 to 51,830 sf. It is easier to preserve trees on a large lot than on a very small lot. But even when excluding the larger lots in the sample, a relatively high percentage of sites in the sample data preserved trees with a large amount of new trees (and future canopy) provided on the remainder. If we look only at the lots in the sample that were 10,000 sf or less:

- 14 of the 87 permits (16%) preserved existing trees on the site (for a total of 35 trees preserved);
- 485 inches of trees were preserved; and
- 73 of the 87 permits (84%) planted new trees (for a total of 295 trees).

This data demonstrates that the existing T1 standard is quite successful in promoting a healthy forest, consisting of a percentage of older existing trees preserved and a percentage of new trees that will each year continue to add to the City's tree canopy.

The following advantages will result from our proposal to expand the T1 standard to apply to more development situations in single-dwelling zones, multi-dwelling zones, and commercial zones.

- By expanding the situations where the T1 standard applies from only applying when a new house is built in the above zones to whenever building coverage is added to a site, it will also capture:
 - Additions
 - New detached structures such as an Accessory Dwelling Units, and a new detached garage, etc.
 - Duplexes , Triplexes, and Multi-dwelling development (new and additions)
 - Commercial development (new and additions)
- Simply by expanding the situations in which the T1 standard would apply will drastically increase the number of lots that will need to comply with the T1 standard, thereby multiplying the results we get today in applying it only to new single-dwelling development.
- The T1 standard is a simple menu of "preserve, plant or pay", or any combination of these things. People can understand the menu. The simplicity will increase compliance.
- The expansion of the T1 standard with the modifications and exemptions we propose does not result in a large increase in work because it is a simple menu offered to the applicant (preserve, plant or pay), and the applicant chooses what works for their situation and site. Regardless of what they choose, we gain either preservation or planting or payment into the Tree Fund which in turn will result in more planting.
- It provides certainty to property owners about what their options are, while at the same time providing the flexibility needed for different situations, while keeping the costs of administration down.

If there is funding available at all, in order to further the goals of ensuring we get the required trees preserved and planted, funding should be used for providing arborist expertise to BDS and for our inspections. Ideally, there would be inspections at these key points in the construction process:

- prior to grading and construction to ensure the protective fencing is in place around trees to be preserved,
- during the construction process, to ensure the required trees to be preserved are protected; and
- at final inspection, to ensure any required new trees are planted, and the preserved trees are still present.

But if there is no funding available for arborist expertise and these inspections, we can still apply the T1 standard as we do today, and most people will do what is required of them.

Some other information of note as you consider the Citywide Tree Project

A Parks Bureau document titled "Urban Forest Canopy: Assessment and Public Tree Evaluation" from October 2007 states that:

- Just under 1/2 of the City's tree canopy is on publicly owned land;
- An inventory was included of the 1.2 million street and park trees. Of these trees, 17% had a "dbh" (diameter at breast height) of 18 inches or greater;
- A little less than 1/2 of all street tree planting opportunities have been planted.

What these figures show is:

- Nearly half of the City's tree canopy can be protected just by managing or regulating trees on publicly owned property. The 16-24% of all sites (from our permit sample of single dwelling residential development) that preserved existing trees, in combination with the ability to regulate existing canopy of publicly owned properties adds up to significant tree preservation.
- The fact that less than half of the street planting opportunities throughout the city have been planted provides significant opportunities for increased tree canopy before we even start talking about tree requirements for private properties. It would be worthwhile to direct funding to developing this part of the City's green infrastructure, and getting more street trees planted, given the extensive opportunities there.
- Not only is a significant amount of the City's tree canopy on publicly owned property, but nearly 20% of that canopy consists of "priority" trees (trees 18 inches and greater). Having the ability to regulate and preserve this amount of mature canopy on publicly owned land, in combination with the sizable percentage of private residential properties (16-24% from our sample) that are already preserving trees should point to less of a need for a hard, regulatory approach to preserving trees on private property, and allow for more of an incentive approach to preservation, possibly through BES credits related to the stormwater benefits they provide.

Approval Criteria about trees added to Land Use Reviews

In past discussions on the Citywide Tree Project, we had indicated we were strongly opposed to adding tree related approval criteria to Adjustment Reviews, Design Reviews, and Conditional Use Reviews, but were in agreement with adding tree-related approval criteria to Conditional Use Master Plans, due to their typically large site size.

We are still strongly opposed to adding approval criteria to Adjustment Reviews. However, we have found a solution with BPS that is workable for Design Reviews and Conditional Use Reviews, where it is not a separate criterion, but trees are taken on balance with other factors being considered in the review. This gives us the tools we need for the appropriate situations to save trees without adding more time and cost to every one of these reviews. Regarding Conditional Use Master Plans, although previously we were in agreement with adding tree-related approval criteria, due to the most recent phase of more layoffs, we are now changing our position on adding tree-related approval criteria and strongly recommend just using the same solution that was developed for Conditional Uses. Furthermore, it is not our experience that Conditional Use Master Plans are the source of unnecessary tree loss. These sites are large, and people have options in the layout of the master plan, and generally are not choosing to unnecessarily remove trees. Adding new criteria is a solution in search of a problem, and adds more unnecessary time and cost to the administration of these reviews for no clear benefit.

Self-Certification System for Inspections

BDS strongly recommends against a self-certification approach to ensuring trees are preserved or planted as required. On the surface it sounds simple and like it wouldn't cost very much to administer it. However, in our experience in trying a similar approach with landscaping, the administrative work associated with self-certification was very time-consuming. First, it would require new programming in TRACS to be able to track these projects and run the necessary reports on a weekly basis to ensure the certifications were coming in. BDS does not have the capacity to get new programming done in TRACS. It would also require staff time each week to figure out which certifications should have come in each week, and follow up with each of those situations where the certification didn't get returned, and dealing with those. In our experience

with the landscape self-certification program we tried, it was not a success. Inspections are far more effective and worthwhile.

If there is any funding available to help the tree project succeed, it would best be used to get inspectors in the field, particularly those with arborist expertise. Currently BDS does not have sufficient inspections staff for even the most basic building, structural, electrical, and plumbing inspections. We have no arborists on staff, and have no funding to pay for time and expertise from the Urban Forestry staff at the Parks Bureau. Arborist expertise available to BDS from early customer assistance, during the review process, and during the construction process, is a critical need and essential to making any tree regulations successful.

SUMMARY

In summary, our proposal to expand and modify the T1 standard is a solution that will achieve the goals of preserving and planting more trees in the City, keeping the regulations simple for the public, and keeping the administrative costs low. We believe it is the best solution for the following reasons:

- It is simple and builds on a system already in place and familiar to the public;
- It offers certainty (preserve, plant or pay into the Tree Fund);
- Administration is simple and requires minimal staff time both in explaining the regulations and options, as well as in the plan review phase. (As stated before, if funding is available, it would best be directed at providing arborist expertise and inspections.);
- It provides flexibility for different site and development situations; and
- With the changes we propose to the planting density portion of the T1 standard, it is practical and reasonable.

We hope that the information we've provided and our recommendations are useful to you as you seek to finalize your work on this project, and move the project on to City Council. It is an important project, and your work on it has been greatly appreciated. We will continue to be in communication with BPS as the project progresses.

I am sorry we are unable to dedicate more time to this very important project, especially at this important juncture in the code development. But at this time, more urgent demands require our full attention as we address the situation at BDS and the increasing gap between our staffing levels and the workload, and take steps to address this situation.

ATTACHMENT

Existing Zoning Code Language commonly known as "the T1 standard"

Zoning Code Section 33.248.020

H. T1, trees.

1. Intent. The T1 standard is a tree requirement for new residential development. It encourages the retention of trees, minimizes the impact of tree loss during development, and ensures a sustained tree canopy in Portland.
2. Tree requirement. This requirement may be met using any of the three options below. The applicant may choose to meet one or more of these options. Adjustments to this Subsection are prohibited. The options are:
 - a. Tree preservation. At least 2 inches of existing tree diameter per 1,000 square feet of site area must be preserved. On lots that are 3,000 square feet or smaller, at least 3 inches of existing tree diameter must be preserved per lot. This standard may be met using trees on the lot and within 5 feet of the edges of the lot. Trees within public and private rights-of-way may not be used to meet this standard. When this option is used, a tree preservation plan is required.
 - b. Tree planting. At least 2 inches of tree diameter per 1,000 square feet of site area must be planted. On lots that are 3,000 square feet or smaller, at least 3 inches of tree diameter must be planted per lot.
 - c. Tree Fund. This option may be used where site characteristics or construction preferences do not support the preservation or planting options.
 - (1) Fund use and administration. The Tree Fund fee is collected by the Bureau of Development Services and is administered by the Urban Forestry Division of the Bureau of Parks and Recreation. The funds collected will be used to plant trees on public or private property in the same watershed as the site.
 - (2) Calculation of required fund contributions. Applicants must contribute the cost to purchase and plant trees, as set out in (3), below. The cost to purchase and plant trees will be adjusted annually as determined by the Urban Forester based on current market prices per inch for materials, labor, and maintenance.
 - (3) Required fund contribution. The applicant must contribute the following to the Tree Fund before a building permit will be issued:
 - For lots with 3,000 square feet or more of area, the cost to purchase and plant at least 2 inches of tree diameter per 1,000 square feet of site area; or
 - For lots with less than 3,000 square feet of area, the cost to purchase and plant at least 3 inches of tree diameter per lot.

Where the "T1" standard currently applies:

In the Single-Dwelling Zones

33.110.282 Trees

- A. Purpose.** The purpose of the tree standard is to maintain and add to Portland's tree canopy and to enhance the overall appearance of single-dwelling development. Trees are an integral aspect of the Portland landscape and add to the livability of Portland. They provide aesthetic and economic value to property owners and the community at large. Trees help to:
- reduce stormwater run-off by intercepting and transpiring precipitation;
 - help to reduce summer temperatures by providing shade;
 - buffer noise;
 - stabilize slopes;
 - provide oxygen;
 - clean the air; and
 - provide wind protection in winter.
- B. Minimum tree standard.** New development must meet the T1 standard of Chapter 33.248, Landscaping and Screening. Adjustments to this standard are prohibited.

In the Multi-Dwelling Zones

33.120.237 Trees

- A. Purpose.** The purpose of the tree standard is to maintain and add to Portland's tree canopy and enhance the overall appearance of single-dwelling development in multi-dwelling zones. Trees are an integral aspect of the Portland landscape and add to the livability of Portland. They provide aesthetic and economic value to property owners and the community at large. Trees help to:
- reduce stormwater run-off by intercepting and transpiring precipitation;
 - help to reduce summer temperatures by providing shade;
 - buffer noise;
 - stabilize slopes;
 - provide oxygen;
 - clean the air; and
 - provide wind protection in winter.
- B. Minimum tree standard.** New development must meet the T1 standard of Chapter 33.248, Landscaping and Screening. Multi-dwelling structures are exempt from this standard. Adjustments to this standard are prohibited. Trees provided to meet the requirements of Section 33.120.235, Landscaped Areas, may apply toward meeting this requirement.

In the Commercial Zones

33.130.227 Trees

- A. Purpose.** The purpose of the tree standard is to maintain and add to Portland's tree canopy and to enhance the overall appearance of single-dwelling development in commercial zones. Trees are an integral aspect of the Portland landscape and add to the livability of Portland. They provide aesthetic and economic value to property owners and the community at large. Trees help to:

- reduce stormwater run-off by intercepting and transpiring precipitation;
- help to reduce summer temperatures by providing shade;
- buffer noise;
- stabilize slopes;
- provide oxygen,
- clean the air; and
- provide wind protection in winter.

B. Minimum tree standard. ~~New residential development must meet the F1 standard of Chapter 33.248, Landscaping and Screening. Multi-dwelling structures are exempt from this standard.~~ Adjustments to this standard are prohibited. Trees provided to meet the requirements of Section 33.130.225, Landscaped Areas, may apply toward meeting this requirement.

C. Exception to minimum tree standard. Residential development is exempt from this standard when buildings cover 90 percent or more of the site.

May 10th, 2010

Portland Planning Commission
1900 SW 4th Ave, Suite 7100
Portland, OR 97201

Urban Forestry Commission
1120 SW 5th Ave, Suite 1302
Portland, OR 97204

RE: Citywide Tree Project and proposed changes to tree codes

Dear Commissioners:

On behalf of the East Multnomah Soil and Water Conservation District, I am writing to express support for the City of Portland's proposed Title 11 which consolidates, fixes, and updates the city's tree codes.

We are delighted by the City's decision to elevate the importance of trees by strengthening and combining the various, and sometimes conflicting, tree codes into a single cohesive and consistent source. This revision makes the tree codes more equitable and easier to access and understand. We also support the creation of a comprehensive framework that addresses both public and private trees in both development and non-development situations. This is a huge step forward. The existing code has many inconsistencies, contradictions and gaps in coverage that have needed to be fixed. You are to be commended for undertaking this project and for making such tremendous progress.

In the spirit of holding Portland's place as a sustainable leader for the Nation, we have two suggestions that we feel would strengthen this policy even further:

- We believe the diameter of trees to be protected is too large. For development it is 20 inches and for private property it is 12 inches. We would like to see a substantially lower diameter of protections especially for development. A 20 inch tree is very large. We feel this diameter should be reduced to 14-16 inches at the largest. 12 inches across the board would be preferable.
- There will be significant personnel time required to make these new rules real on the ground. We believe that trees are among this City's greatest treasures – they define our region. We urge the Council to fund the capacity needed to fully implement this "new" code. Let us transcend the stigma of "Stumptown"!

Given that you are receiving so many comments on this project, we request that any significant changes to the revised code as currently proposed be submitted for public review and comment before final adoption.

Thank you for considering our comments in support of the Citywide Tree Policy Review and Regulatory Improvement Project and for doing this important work!

Sincerely,

Jean Fike
Executive Director

T.59

Hamilton, Joan

From: Lisa Gorlin [lianagan@hotmail.com]
Sent: Thursday, May 06, 2010 1:23 PM
To: examiner@inseportland.com
Cc: Planning Commission
Subject: Preservation of Urban Trees is More Important than Planting
Importance: High

To the Editor:

Contrary to what developer Jeff Fish believes (*Fish Flies at Trees - SE Updates, May, 2010*), there is nothing emotional about the fact that cutting down a tree on one piece of property effects the ecology of surrounding properties, and when this action is multiplied, the entire city's ecosystem is compromised. This is science, not imagination. Private property owners in Portland do not exist on islands or in a vacuum.

Most people know that healthy, plentiful trees are beneficial to the city environment. They filter air and noise pollution, manage storm water by intercepting rainfall, cool down hot spots to keep temperatures at livable levels and provide valuable habitat for birds. They're also good for property values.

Preservation is more important than planting. Mature trees provide up to 70 times more pollution removal than small trees, and they also provide anti-flood protection. Every time a tree is removed the volume of storm water a city must manage increases. With Portland's ageing sewer system and skyrocketing maintenance costs, it is easy to see where the savings are.

The preservation of trees is important for both the city's environment and budget and essential if Portland is to remain on the list of Tree Cities USA. In addition to public image and citizen pride, Tree City USA communities are sometimes given preference over other communities when allocations of grant money are made for urban forestry programs. In our current economic climate this is vital for the management of Forest Park, for example. In order to maintain its Tree City designation

Portland must insure the preservation of the urban tree canopy and make it a priority before it's too late. Simply allowing developers to mitigate by planting trees is not acceptable. Stricter regulations must be applied and fines levied for non-compliance. Preservation should always be the least expensive option.

The rest of us are not silent, as Mr. Fish stated. The low attendance at the Planning Commission/Urban Forestry Commission work sessions is just an indication that the meetings were poorly publicized. There is still time for public input. Comments can be sent to planningcommission@ci.portland.or.us The draft of the proposed code amendments can be viewed at www.portlandonline.com Go to: [Government](#) → [Bureaus & Offices](#) → [Planning & Sustainability](#) → [What We Do](#) → [Planning](#) → **[Citywide Tree Regulatory Improvement Project](#)**

In San Francisco, mature trees are treated like historic buildings. We can have this model for Portland, too. Increased regulations and a greater focus on preservation, instead of just planting, will insure the livability of our city, environmentally, aesthetically and economically, for generations to come.

Sincerely,

Lisa Gorlin

T.60

5/10/2010

Hamilton, Joan

From: BPS City Tree Project
Sent: Tuesday, May 11, 2010 1:41 PM
To: Hamilton, Joan
Cc: Jortner, Roberta (Planning)
Subject: FW: Tree Plan Portland

Can you include with the testimony received? Thanks

From: NICOLE LEGGETT [mailto:nmleggett@msn.com]
Sent: Monday, May 10, 2010 8:55 PM
To: Black, Myles; BPS City Tree Project
Subject: Tree Plan Portland

I'd like to thank Morgan Tracy & Myles Black for giving me your time for my understanding. Below are my comments to the commissioner.

Nicole Leggett

From: nmleggett@msn.com
To: samadams@ci.portland.or.us; nick@ci.portland.or.us; randy@ci.portland.or.us; amanda@ci.portland.or.us; dan@ci.portland.or.us
Subject: Tree Plan Portland
Date: Mon, 10 May 2010 20:44:11 -0700

Commissioners,

The Portland Tree Plan must compliment The Portland Plan.

I was moved to tears seeing many trees clear cut in my Kenton neighborhood. This act of destruction motivated me to contact Urban Forestry. From there I gathered that lots that are that are segregated vs. divided lack any protection or preservation for trees. I then investigated further hoping to find that the loop hole would be closed inside the New Portland Tree Plan. I found that the original plan it had, but now it isn't again. It seems the development community in it's quest for quick profit have convinced your committee away from this protection. I'm hear to say they are wrong. The segregated lots, that housed much wildlife, now will contain two row houses. These houses are undesirable (as many are not selling in my neighborhood) and unaffordable (medium income in Portland couldn't support buying one.) This kind of development does not support Portland's long term planning around substantial, affordable, high density housing. In the same space could have been built a multiple unit dwelling. The heritage worthy tree and many others could have been saved. The finished units would house more people and be more affordable.

I understand that lots under 3000sf have no mitigation for removing trees. That all you'll need is a building permit. There will no Tree Preservation Plan. No contributing to planting or protecting other trees in the watershed. These lots may only represent 4% of Portland's lots. But isn't it's Portland's Plan to maintain the urban forest? Why decide now to just let all those lots be cut. It's less practical to replant and wait for shade then to set up standard to keep what we have. It makes sense to plan better rather then quicker. When getting through more permits takes longer then wanted, tell them Portland is planning for your Grandchildren. The Urban Forester has to visit all sites before a building permit is issued. Why not send them in to protect trees. This plan needs to give them the standards to stand buy.

T.61

If Portland wants to be the most livable city in the nation we must plan on preserving tree cover while building affordable high density housing. We must do our share to keep our air, water, and earth pure. We must protect what is beautiful as we develop what will be beautiful. Please protect all lots equally and prevent cutting trees that should be kept as Heritage Trees.

Nicole Leggett
 9213 N Endicott ave
 503-283-7958

Permit/Case Report	<u>Understand this Report</u>
8729 N CURTIS AVE	
Permit/Case Number	2010-115418-000-00-RS
Permit/Case Type	Residential Bldg/Trade Permit Single Family Dwelling New Construction
Work/Case Description	NSFR / 2 STORY / ATTACHED GARAGE / FLAT LOT / SIMPLE
Issue Date	
Final Date	
Latest Activity	3/23/2010
Status	Approved to Issue

Activities	Must Check	Activity Status	Last Activity	Completed	Staff
Application					
2nd Screen App Set-Up	Y	Approved	03/02/2010	03/02/2010	Millar 7379
P & Z - Property Check	Y	Approved	03/02/2010	03/02/2010	Millar 7379
Life Safety - Application Check	Y	Approved	03/02/2010	03/02/2010	Millar 7379
Issuance/Intake					
Intake - DSC	Y	Intake	03/02/2010	03/02/2010	Millar 7379

Process Management						
Process Manager	N	Completed	03/23/2010	03/23/2010	Thorn	<u>7455</u>
Assign Reviews - RS	N	Completed	03/09/2010	03/09/2010	Thorn	<u>7455</u>
Corrections Received - RS	N	Completed	03/10/2010	03/10/2010	Millar	<u>7379</u>
Addressing						
Assign Address	Y	Approved	03/11/2010	03/11/2010	Richa	<u>0678</u>
Planning and Zoning						
Planning and Zoning Review	Y	Approved	03/16/2010	03/16/2010	Freem	<u>5663</u>
Erosion Control						
Erosion Control Plan Review	Y	Approved	03/08/2010	03/08/2010	Freem	<u>5663</u>
Life Safety						
Life Safety Plan Review	Y	Approved	03/18/2010	03/18/2010	Qurai	<u>823-7</u>
Structural						
Structural Review	Y	Approved	03/18/2010	03/18/2010	Qurai	<u>823-7</u>
Plumbing/Subsurface Review						
Residential Subsurface Site Evaluation	Y	Approved	03/08/2010	03/08/2010	Hyatt	<u>7979</u>
Environmental Services						
BES Environmental Review	Y	Approved	03/26/2010	03/23/2010	Matth	<u>823-7</u>
Transportation						
Transportation SDC Review	Y	Approved	03/19/2010	03/19/2010	Redea	<u>7570</u>
Trans - Street Systems Review	Y	Approved	03/19/2010	03/19/2010	Redea	<u>7570</u>
Street Systems - Assign Reviews	N	Completed	03/19/2010	03/19/2010	Redea	<u>7570</u>
Water Bureau Review						

Water Available	Y	Approved	03/03/2010	03/03/2010	Curtis <u>6988</u>
Parks Bureau					
Parks SDC Review	Y	Approved	03/25/2010	03/05/2010	Spenc <u>7720</u>
Urban Forestry Review	Y	Approved	03/22/2010	03/22/2010	Black <u>4018</u>
Issuance					
Pre-Issuance Check	Y	Completed	03/23/2010	03/23/2010	Eudal <u>7081</u>

May 10, 2010

City of Portland Planning Commission/Urban
Forestry Commission
1900 4th Ave., Suite 7100
Portland, OR 97201

Re: Proposed Title 11 (Trees)

Dear Commissioners:

The proposed Title 11, which would regulate all trees in the City of Portland, would interfere with the replacement of the historic street trees in Ladd's Addition. I have attached the following: (1) cover sheet and page 7 from the Ladd's Addition Conservation District Guidelines (Guidelines), which were adopted by the City Council on February 10, 1988; (2) the first page of the City's Nuisance Plant List; (3) a description of the extraordinary efforts that residents have undertaken as volunteers to preserve the tree heritage in Ladd's Addition.

From the "Street Tree Plan Map," which is included on page 7 of the Guidelines, it becomes clear that the historic street tree on most of the streets in Ladd's Addition is the Norway Maple. The Norway Maple is on the city's Nuisance Plant List. If Norway Maples cannot be planted in the city right of way, then it will become impossible to replace those Norway Maples in Ladd's Addition that succumb to age.

In the 1980s, I participated in a street tree replanting project that was extremely successful. We partnered with the City Forester at the time, Alex Wynstra, and we later became a source of information to those engaged in forming Friends of Trees. To re-establish the uniform streetscape, we planted well over 150 Norway Maples in spots along the street where there had not been a tree for years.

The Norway Maples define the neighborhood as much as the American Elms. The Guidelines expressly state that the "Street Tree Plan adopted by the City for Ladd's Addition governs street tree selection and replacement on each street." If a different tree is substituted for the Norway Maple on those streets where Norway Maples are the designated tree, the character of the neighborhood will change. First, the new trees will not preserve the consistency that is so important to the character of the streets. Second, any substitution will not have the scale and quality of the Norway Maple itself.

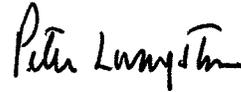
City of Portland Planning Commission/Urban Forestry Commission

May 10, 2010

Page 2

I strongly urge the city to adopt a limited exception to the general prohibition on planting Norway Maples in city rights of way so that the character of the streets in the Ladd's Addition Historic District can be preserved.

Very truly yours,

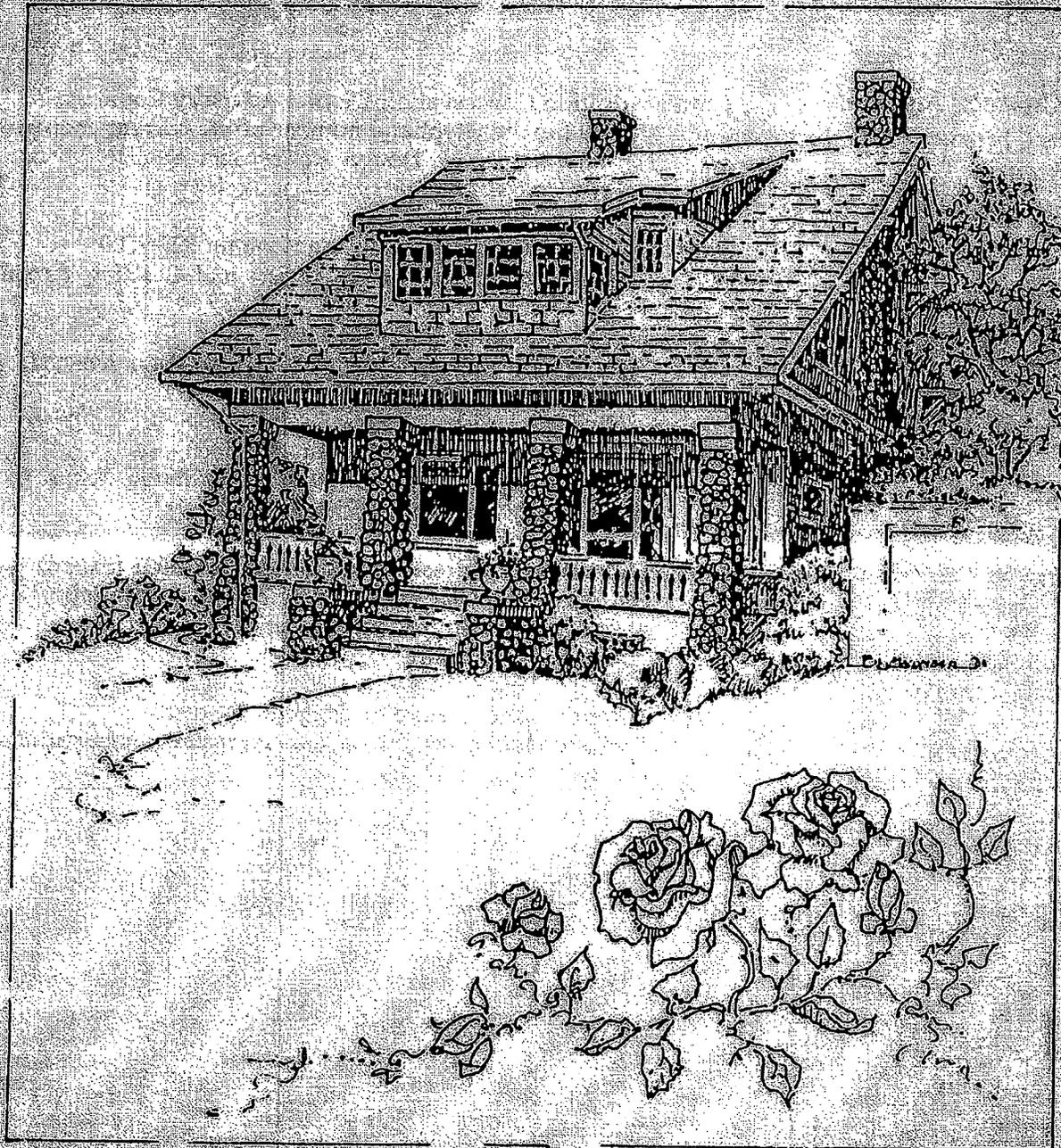
A handwritten signature in black ink that reads "Peter Livingston". The signature is written in a cursive style with a large initial "P".

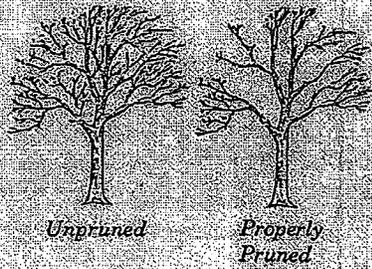
Peter Livingston
1524 SE Poplar Ave.
Portland, OR 97214

PLI:mca
Attachments



Ladd's Addition Conservation District Guidelines





Unpruned

Properly Pruned



Sheared



Pollarded

6. **STREET TREE CONSERVATION, REMOVAL AND MAINTENANCE:** All prudent measures should be taken by the City, utility companies and property owners to preserve original street trees, especially the American Elms and Norway Maples. The Street Tree Division will notify the Advisory Council of requests for removal permits. Removal is warranted only when an imminent danger to the public exists. Sidewalk repairs and other excavation or construction near trees should avoid cutting tree roots.

The City is responsible for disease prevention and tree spraying. The City Code makes normal maintenance and pruning the obligation of property owners. Pruning practices should respect natural growth habits; topping, shearing and pollarding of street trees is strongly discouraged. Permits from the Street Tree Division are required for the planting, removing, or pruning of all trees except those on private property. Street trees are on public property.

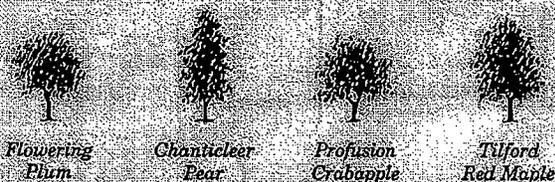
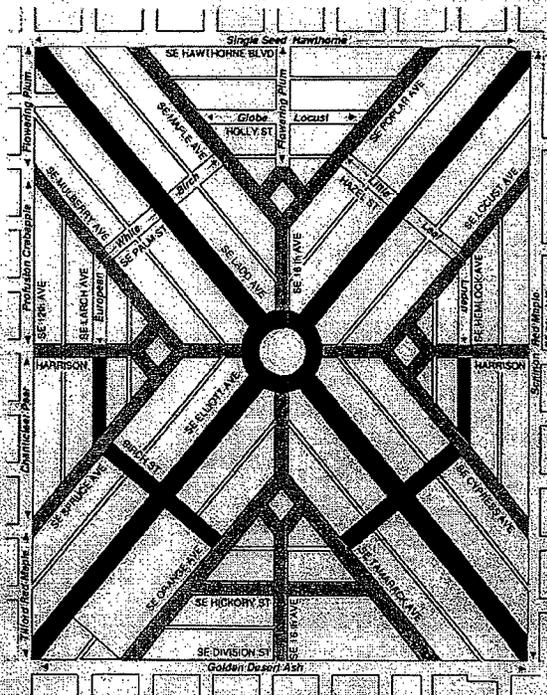
7. **STREET TREE REPLANTING:** On all frontages, replanting of missing street trees should be done in accordance with the Ladd's Addition Street Tree Plan. Replanting is required in obtaining tree removal permits.

8. **STREET TREE PLAN:** A Street Tree Plan adopted by the City for Ladd's Addition governs street tree selection and replacement on each street. Species designated in the plan should be consistent with the character, height, canopy and spacing of a street's original plantings, the width of the parking strip, and the scale and function of the street within the district.

STREET TREE PLAN MAP

LEGEND

-  American Elm
-  Norway Maple
-  Other species as labeled



Nuisance Plant List

Nuisance Plant List

Plants on this list can be removed without environmental or greenway review. Other local, state, or federal laws may still regulate removal of certain plants on this list. These plants may be native, naturalized, or exotic. They are divided into two groups — plants which are considered a nuisance because of their tendency to dominate plant communities, and plants which are considered harmful to humans.

Scientific Name	Common Name	Indicator Status
<i>Acer platanoides</i>	Norway Maple	NI
<i>Acroptilon repens</i>	Russian knapweed	
<i>Aegopodium podagraria</i> and variegated varieties	Goutweed	
<i>Agropyron repens</i>	Quack grass	
<i>Ailanthus altissima</i>	Tree-of-heaven	NI
<i>Alliaria officinalis</i>	Garlic Mustard	
<i>Alopecurus pratensis</i>	Meadow foxtail	
<i>Anthoxanthum odoratum</i>	Sweet vernalgrass	
<i>Arctium minus</i>	Common burdock	
<i>Arrhenatherum elatius</i>	Tall oatgrass	
<i>Bambusa</i> sp.	Bamboo	
<i>Betula pendula lacinata</i>	Cutleaf birch	
<i>Brachypodium sylvaticum</i>	False brome	
<i>Bromus diandrus</i>	Ripgut	
<i>Bromus hordeaceus</i>	Soft brome	
<i>Bromus inermis</i>	Smooth brome-grasses	
<i>Bromus japonicus</i>	Japanese brome-grass	
<i>Bromus sterilis</i>	Poverty grass	
<i>Bromus tectorum</i>	Cheatgrass	
<i>Buddleia davidii</i> (except cultivars and varieties)	Butterfly bush	
<i>Callitriche stagnalis</i>	Pond water starwort	
<i>Cardaria draba</i>	Hoary cress	
<i>Carduus acanthoides</i>	Plumeless thistle	
<i>Carduus nutans</i>	Musk thistle	
<i>Carduus pycnocephalus</i>	Italian thistle	
<i>Carduus tenuifolius</i>	Slender flowered thistle	
<i>Centaurea biebersteinii</i>	Spotted knapweed	
<i>Centaurea diffusa</i>	Diffuse knapweed	
<i>Centaurea jacea</i>	Brown knapweed	
<i>Centaurea pratensis</i>	Meadow knapweed	
<i>Chelidonium majou</i>	Lesser Celandine	
<i>Chicorium intybus</i>	Chicory	
<i>Chondrilla juncea</i>	Rush skeletonweed	
<i>Cirsium arvense</i>	Canada Thistle	FACU+

Keeping Ladd's Addition Green: 1891-2007

A Brief History of Ladd's Addition, it's street trees, and SAVE OUR ELMS.

1891 WILLIAM S. LADD PLATS LADD'S ADDITION out of one of his Eastside farms. New Hampshire native and Portland business leader lays out a Victorian "residence park" and dedicates five "village greens" as city parks.

1893 WILLIAM S. LADD DIES and is buried in Riverview Cemetery.

1905 PRESS DENOUNCES LADD FAMILY for using undeveloped city parks and streets as private cow pastures!

1907-1910 LADD ESTATE COMPANY PAVES MOST STREETS, sidewalks, alleys. **Plants 1600 street trees.**

☞ Earliest homes built near Hawthorne.

☞ Classic street trees planted: American Elms, Norway Maples, Little Leaf Lindens, Birch, Walnut.

☞ City develops four formal rose gardens and Ladd Circle Park, led by Olmsted Brothers' associate Emanuel T. Mische.

1977 CITY DESIGNATES LADD'S ADDITION A HISTORIC DISTRICT. Oregon's oldest planned community, known for its unique street system, alleyways, formal parks, and extensive street trees.

1910-1985 HALF OF THE ORIGINAL STREET TREES LOST TO STORMS, bad pruning, neglect, age, and street widening. By 1985 40% of the district's 640 properties have no street trees.

1986-1987 HISTORIC DISTRICT ADVISORY COUNCIL LAUNCHES LADD'S ADDITION TREE BANK.

☞ Goal is to reforest Ladd's Addition. Volunteers plant 250 Norway Maples and Little Leaf Linden street trees at no cost to residents.

1988 LADD'S ADDITION NAMED TO THE NATIONAL REGISTER OF HISTORIC PLACES, in recognition of the district's community design. City adopts new historic district guidelines to govern new tree plantings, streets and parks, new construction, exterior remodeling.

1990 VOLUNTEERS PLANT FIRST NEW DISEASE-RESISTANT HOMESTEAD ELMS (102 trees) with 30 Little Leaf Linden, Maples, and Birch trees. (140 trees total). New elms, grown in Oregon, are the first authorized for planting by Oregon Dept. of Agriculture.

1991-1995 FIRST AREA LOSS OF AMERICAN ELMS TO DUTCH ELM DISEASE (six trees on Ladd Circle and SE Birch) 270 American Elms remained in 1995.

1995 SAVE OUR ELMS ESTABLISHED. Volunteers lead Oregon's first community inoculation program for American Elms against Dutch Elm Disease. Winter pruning program for large street trees started in 2005.

1996-2007 TWELVE ANNUAL SAVE OUR ELMS TREE PLANTINGS (at no cost to residents). Volunteers annually plant 10-20 new street trees, 10 new elms per year, including new disease-resistant Homestead and Accolade Elms.

2007 BENEFITS OF KEEPING LADD'S ADDITION GREEN

☞ Minimal losses of mature American Elms to Dutch Elm Disease (DED) through annual inoculating 1/3 of the grove. Typical DED losses would be 10% of our grove a year or **25 elms per year**. Our losses since 1995, **only 15 elms**.

☞ Ladd's Addition is now inner city Portland's most heavily forested community.

☞ A cooler place in the summer. Less storm water runoff with both mature and new canopy.

☞ Most complete reforestation of street trees in Portland, plantings follow the 1988 historic district tree plan.

☞ 540 new street trees planted by volunteers from Historic District Council and SAVE OUR ELMS since 1986.

☞ Largest planting of new elms in Oregon. (220 trees).

☞ Property values are higher than similar neighborhoods that lack a mature, complete street tree canopy.

ALL ACCOMPLISHED BY COMMUNITY VOLUNTEERS, CONTRIBUTIONS, GRANTS AND BEQUESTS.

Hankins True Value Hardware 1720 SE Hawthorne	HAND HONFORD-ABENNETH HISTORIC DISTRICT ADVISORY COUNCIL	FRIENDS OF LADD'S ADDITION GARDENS	NEW SEASONS MARKET Collecting and Celebrating our Community Full of everyone who lives, works or plays in Inner Northeast Portland	Rafio Purveyor of Espresso House	STARBUCKS COFFEE
---	---	--	---	--	-----------------------------

Support these neighborhood Organizations and Businesses that support SAVE OUR ELMS

EXHIBIT TO PETER LIVINGSTON LETTER (5-11-10)



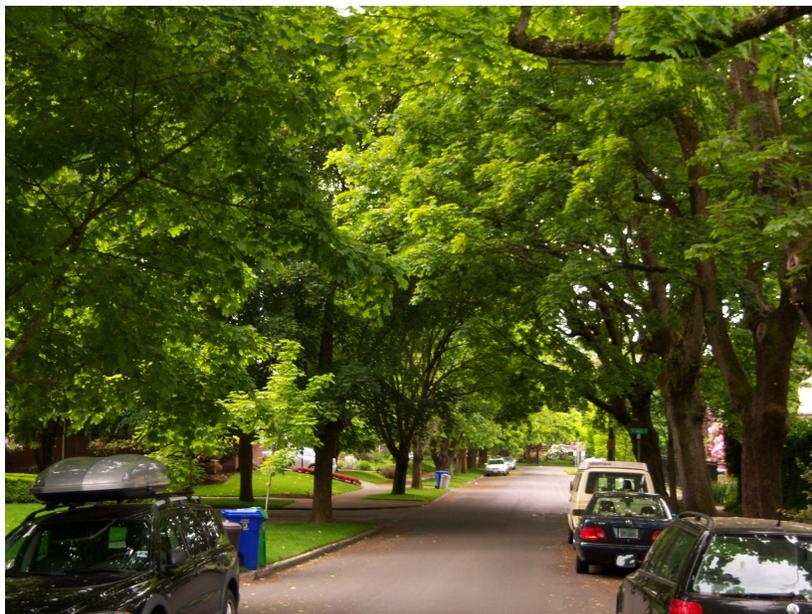
Looking south on SE Poplar Avenue (west side) at small trees recently planted with approval of City Forester. These do not match the Norway Maple designation of SE Poplar Avenue



Looking south on SE Poplar Avenue (east side), showing the Norway Maples planted in 1987 mixing with older trees.



Looking down SE Holly Street, where the trees are a hodge-podge, creating a disjointed effect. The street is not visually unified. These trees were planted at different times. The street tree recommended by the City Forester in 1987, some variety of locust, did not work out because it was a grafted tree, which in all cases split at the graft. All of these trees had to be removed. The new tree recommended by the City Forester is another small variety, which further undermines the historic character of the street.



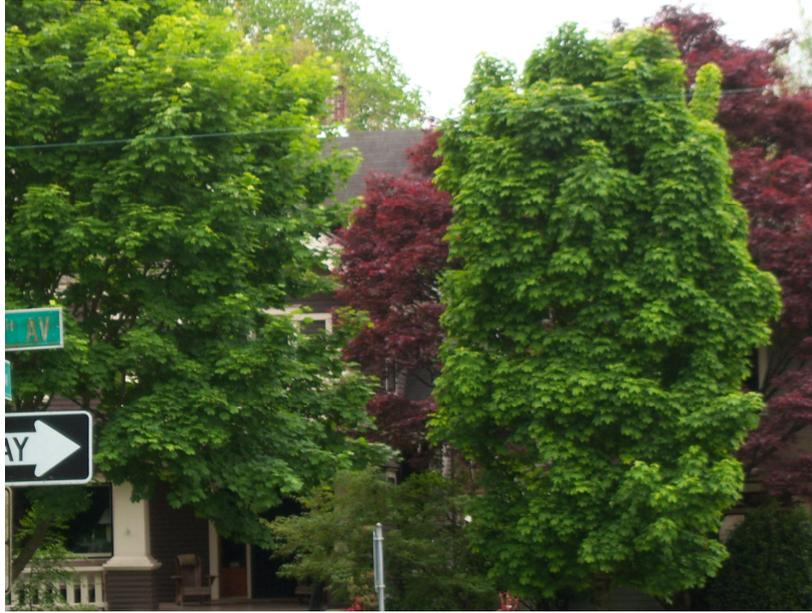
Looking at the Norway Maples on SE Poplar Avenue, south of SE Holly Street, which enters at the left.



On the north rose garden (east side), a row of Norway Maples planted in 1987.



On the north rose garden (west side), a row of Norway Maples planted in 1987. The quiet uniformity of the trees focuses attention on the rose garden itself.



On the north rose garden (south side), an example of a non-Norway Maple, planted after 1987, whose columnar shape does not match the Norway Maple to the left in its configuration.

May 11, 2010

City of Portland Planning Commission/Urban
Forestry Commission
1900 4th Ave., Suite 7100
Portland, OR 97201

Re: Proposed Title 11 (Trees)

Dear Commissioners:

This letter follows up on a letter I sent yesterday. Since then, I have had an opportunity to develop additional information about the Norway Maples in Ladd's Addition.

I attach several pages from the National Register of Historic Places application for designation, which was filed in 1988. As the application explains:

"Generally, the major diagonal avenues and Ladd Circle are planted with American Elms and the minor diagonals and Harrison and 16th are planted with Norway Maples. The other interior streets are planted with Norway Maples, Persian Walnuts, European White Birches, and American Elms. Over the years, some homeowners have planted ornamental species in the strips fronting their houses, which are not compatible design, but the overall number of these is slight. In 1987 the district advisory council sponsored a street tree planting program to reintroduce historic tree species on streets where they had been lost."

This discussion and mentions elsewhere in the application show that the existing plantings of Norway Maples are an essential part of the character of the neighborhood. The uniformity of the trees on individual streets was emphasized in the application for National Register designation because these historic plantings are critical to the quality of life and historic character of Ladd's Addition. Having a uniform row of street trees on either side of the existing streets reinforces the formal design of the street plan, which is the essence of Ladd's Addition.

I attach photographs showing how Norway Maples support the street plan and how efforts (mostly by the City Forester) to introduce other, more modern or trendy species have weakened the visual impact of the street trees on at least one street. In 1987, neighborhood volunteers spent hundreds of hours researching the historic trees, obtaining federal funds for new

T.63

City of Portland Planning Commission/Urban Forestry Commission

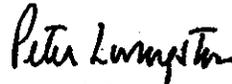
May 11, 2010

Page 2

trees and organizing teams of additional neighbors to plant them. This effort was critical to enhancing the quality of life in the neighborhood, which has attracted new residents and dramatically increased property values (and property tax collections). Instead of fighting the historic character of the neighborhood, the City Forester and the Urban Forestry Commission should be supporting it.

The city should adopt a limited exception to the general prohibition on planting Norway Maples in city rights of way so that the character of the streets in the Ladd's Addition Historic District can be preserved. Better still, the city code should clearly indicate that the trees designated by the Ladd's Addition District Guidelines for individual streets are required and that undesignated trees are prohibited.

Very truly yours,



Peter Livingston
1524 SE Poplar Ave.
Portland, OR 97214

PLI:mca
Attachments

United States Department of the Interior
National Park ServiceNational Register of Historic Places
Continuation SheetSection number 7 Page 7.9

Physical Development of Ladd's Addition: 1891-1918

In 1891 banker and entrepreneur William S. Ladd hired civil engineers Arthur Hedley and Richard Greenleaf to survey the land he had acquired in the 1870s. Greenleaf already had connections with Ladd; he had surveyed a number of early Portland plats and, by 1890, was working as a surveyor for the Real Estate Title and Trust Company (Photo 2). This company had been established by Ladd in 1888 as a trustee service for managing residential and commercial real estate, as part of the expanded services offered by Ladd and Tilton Bank. Ladd's son, William Mead Ladd, was president of the company. The genesis of the geometry of the plat is unknown, although oral traditions attribute the idea to Ladd, who overrode the objections of surveyor Hedley. With the exception of the diagonal avenues, Ladd and Elliott--Elliott was Ladd's wife's maiden name--the streets were given the names of various species of trees. Prior to the final plat recording, seven names were changed: the two streets bisecting Ladd's Addition, which linked it with the city grid, were renamed to provide continuity within the city: thus, Chestnut Street became Harrison Street (which itself had formerly been called Alaska Street), and Elm Street became 16th Street, later 16th Avenue. Five other names were changed because they duplicated the names of other city streets: Cedar became Orange, Linden became Hickory, Walnut was changed to Tamarack, Myrtle was altered to Lavender, and Laurel became Poplar.

Ladd's death early in 1893 and the recession following the economic panic later that year halted development of the plat. Although water was provided to the undeveloped lots in 1895, there were to be no further improvements for a decade. The land was leased to a farmer, who raised hay and pastured livestock on the property (Photo 3).

Development began in the district as general economic activity picked up after the turn of the century. In 1907 the city granted a permit to the Ladd estate to improve the streets in Ladd's Addition, and in April an ordinance was passed fixing the curblines within the district; a few weeks later over three miles of asphalt pavement were laid, and sidewalks installed along the two major avenues and in the north end. Several streets in the south end of the district--Birch, Orange, Tamarack, Lavender, Cypress, Hickory and the south half of 16th, were not improved until 1910. When sidewalks were installed, tethering rings for horses were anchored at irregular intervals along the curbs on all streets; many of these are still in place. It appears the street trees--Elms (*Ulmus americana*), Norway Maples (*Acer platanoides*), Little Leaf Lindens (*Tilia cordata*), European White Birches (*Betula pendula*), and Persian Walnuts--were planted in the north half of the district in 1907, followed by plantings in the south end several years later.

Until 1908, the Ladd estate heirs--Ladd's wife, sons and daughters--legally owned most of the property in Ladd's Addition. In 1905, some of the lots were sold to realtor Rufus L. Cate, who built the first houses in the district, near Hawthorne Boulevard: two houses on S.E. Poplar Avenue (20-20 and 20-29) and one house on S.E. Holly (19-09), built in 1905, are attributed to him (Photo 4). Built in the Craftsman style, these large, two-story, wood-framed structures had ample room for large families and servants. In 1906-08, eighteen more commodious Craftsman style and Colonial Revival residences were built, some on speculation by realtors like Cate, and some by contractors hired by the owners. Development was limited to six blocks in the north end of the district (See Map 2).

In May of 1908 Ladd's three sons--William M., Charles E. and John Wesley--incorporated the Ladd Estate Company and immediately purchased the unsold holdings in Ladd's Addition from their relatives, amounting to all but seventeen lots on which houses had already been built, and six vacant lots on the northwest end of Block 21, which had been sold but not developed. William M. Ladd assumed the presidency of the company, and Frederick H. Strong, who had been a department manager

United States Department of the Interior
National Park ServiceNational Register of Historic Places
Continuation SheetSection number 7 Page 7.11

development of the five public parks, which reinforce the unusual juxtaposition of public and private spaces and serve to spatially organize subcenters within the district; (4) its relatively early use of street trees, which today reinforces the unity of the district; (5) the consistency in scale, massing and style of its residential buildings (Photo 11); (6) the development of the service alleys and construction of auxiliary buildings, creating a tertiary network of narrow "streets" lined with small scale buildings, related to, but visually independent of the major buildings; (7) the inception of additional building typologies--particular churches-- which provided stylistic and typologic variation within the district and began to establish a pattern of secondary development leading to its present-day nature as a complete neighborhood comprised of a variety of building types (Photo 12).

Physical Development of Ladd's Addition: 1919-1939

The physical characteristics developed prior to 1918 were completed and augmented during Ladd's Addition's secondary period of historic significance. By the end of the 1930s it had essentially achieved the qualities for which it is known today: sixty percent of the major structures in the district were built during the years between the wars. During this period, infill houses--primarily bungalows and period revival style residences-- were constructed on vacant lots in the northern quadrants of the district, and the vacant blocks and lots in the south quadrants were developed, almost exclusively by contractors building on speculation. The variety of building types increased: commercial structures and large apartment buildings were erected along the district boundaries; a public school was built, and a manufacturing plant constructed. All of these changes reinforced the sense of place within Ladd's Addition without violating the qualities established prior to the first world war (See Maps 4-6).

Between 1919 and 1921, fifteen houses were built, most of them bungalows on blocks with already existing houses. Towards the end of 1921 or in early 1922, the Ladd Estate Company apparently began a promotional campaign, possibly accompanied by a liberal financing policy, which, coupled with an increasing demand for housing in the city, sparked significant development in the district, primarily in the south quadrants (See Map 4). Twenty-four buildings were constructed in 1922, 105 in 1923, 113 in 1924, fifty-four in 1925, and thirty-three in 1926. Construction dropped rapidly after 1926: between 1927 and 1939 only forty-four buildings were erected (See Table 2).

The residential buildings constructed during this period were generally more modest than their predecessors. They were smaller in scale, and simpler in detail. Most were bungalows, although a number of period revival residences and duplexes were also built--primarily Colonial and English Cottage styles. They were usually built on standard sized lots, and retained the street and side setbacks which characterized the placement of the earlier houses. Like the earlier buildings, they were wood frame houses, and the use of horizontal wood board siding, double-hung windows and front porches on most of these structures visually linked them with the pre-war residences (Photo 13). While many houses in the primary period were constructed on speculation, it was during this interval between the wars that the district experienced wholesale development by contractors, realtors and speculators. Entire blocks in the southern quadrants were developed by a handful of contractors, resulting in many identical and almost identical houses. This is most noticeable in Blocks 2, 3, 28, 29, and 31, where most of the buildings were constructed by Fitch, Potts and Sons, G.C. Goldenberg, A.J. Brugger, J.W. McFadden Building Company, Fred. E. Conley Company, Pacific Building Company, or the Lauman family (See Table 3 for a list of major contractors in the district).

Commercial development within the district began during this period. The Ladd Circle Grocery, built prior to the establishment of a citywide zoning code in 1924, was the first commercial building in the district; it was built in 1923 in the heart of Ladd's Addition, on Ladd Circle (Photos 14,15). It was also the first building constructed on the circle, where the large, irregular lots were priced higher than

United States Department of the Interior
National Park Service

National Register of Historic Places
Continuation Sheet

Section number 7 Page 7.24

Contributing Resources:
Non-Contributing Resources:

006 Ladd's Addition Street Trees 1907

1 All Streets in Ladd's Addition

Legal: BOQ N/A

0 Ladd's Addition Conservation District

Contractor: Ladd Estate Company

Designer: Unknown

Style: N/A

Contributing: Primary

Description: In 1907, when the Ladd Estate Company paved the streets and installed the sidewalks, they also established a hierarchy of widths for the parking strips widths, where the street trees are planted. The diagonal avenues, Ladd and Elliott, and Ladd Circle have twelve foot wide parking strips, and generally, the secondary streets have ten foot wide parking strips. Generally, the major diagonal avenues and Ladd Circle are planted with American Elms and the minor diagonals and Harrison and 16th are planted with Norway Maples. The other interior streets are planted with Norway Maples, Persian Walnuts, European White Birches, and American Elms. Over the years, some homeowners have planted ornamental species in the strips fronting their houses, which are not compatible with the original design, but the overall number of these is slight. In 1987 the district advisory council sponsored a street tree planting program to reintroduce historic tree species on streets where they had been lost. Most streets in the district have iron horse tethering rings located at irregular intervals along the curbs, and contractors' names and dates of construction stamped on the walks, which were installed when the concrete sidewalks and curbs were poured.

Cultural Data: The Ladd Estate Company apparently installed street trees in the north half of the district when the streets were paved and the sidewalks installed in 1907. The trees in the south half were probably installed in 1910, when the remaining streets in the district were paved. In a 1909 letter from Frederick Strong, secretary-treasurer of the Ladd Estate Company, to park superintendent E.T. Mische, Strong asked for advice on the selection of suitable species of trees and appropriate spacing between individual trees for the south end of the district.

May 11, 2010 Hearing

Portland Planning Commission
Portland Urban Forestry Commission

RE Proposed Title 11 .300, and 11.400

Will the new Tree Code Eradicate Portland's most popular Street Tree?

Dear Commissioners

As a past member of the Urban Forestry Commission and Vice President of Save Our Elms, I am concerned about the death warrant for Norway Maples, Portland's most popular street tree, that is hidden in the Proposed Code.

The broad nuisance designation of the City's most common tree, which provides a large share of our street canopy, sends a confused message about street trees. *Absent public awareness about damages to local natural areas that may be caused by these trees*, this action seems contrary to existing City policies that support large canopy street trees for their stormwater, environmental, habitat, urban design and historic value.

Norway Maples and their many cultivars have provided environmental benefits to scores of Portland neighborhoods for a century or more. Oregon nurseries (e.g. JFrank Schmidt) have been national leaders in developing new and healthier cultivars of the Norway Maple. According to the Proposed Code, eradication of Norway Maples as street trees is now the City's policy and replanting of any of the cultivars is forbidden.

Ladd's Addition Historic District for example was designated to the National Register in part because of its mature American Elms and Norway Maples. For 25 years, neighbors here have engaged in replanting disease-resistant varieties of elms and maples, following close advice from Urban Forestry at every step. I agree with other testimony you have received that Historic District Norway Maples should be eligible for exceptions to the prohibition on replanting.

However, the death warrant for Norway Maples needs more public outreach by Urban Forestry. If this is the direction of the City, there is a lot of public education needed about why this favorite tree is no longer allowed.

Urban Forestry should be designated to work with neighborhood groups with large Norway Maple streetscapes to resolve future planting and transitions on those streets, rather than allow a menagerie of new trees to replace the Norway Maple's orderly and iconic streetscape.

Save Our Elms works in seven neighborhoods to protect Portland's unique heritage of urban elms and support the health of the broader urban forest. We would be happy to participate in this dialogue.

Sincerely

Richard N Ross
2041 SE Elliott Ave
Portland, Oregon 97214
503-807-0612

T.64

Hamilton, Joan

From: jwadman@comcast.net
Sent: Tuesday, May 11, 2010 5:08 PM
To: Planning Commission
Subject: City Wide Tree project

I am writing in regards to the City Wide Tree Project and the recommendations that have been presented by this team. I would like to voice my support for all the recommendations put forward as outlined in the April issue of the Southeast Examiner.

I live in the Buckman neighborhood of inner Southeast Portland where we purchased our home in 2002. We have recently been faced with a situation regarding a mature, healthy Sycamore Maple tree that is on our property, but close to the property line and an adjoining property owner's request of us to have the tree cut down. I have found navigating the current policies, regulations and laws related to 'city trees' to be a very confusing and time consuming process. The recommendation to have a 24 hour information hot line as well as one source to consult for all regulations governing trees would have helpful.

Our choice to purchase a home in Portland was due to many reasons; high on the list was the value that Portland places on the Urban Canopy. I found that the infrastructure for supporting the Urban Canopy (consistent easy to find regulations, laws and permitting process) surprisingly lacking when I was faced with this recent conflict. I feel that many of the recommendation made by the City Wide Tree Project would begin to truly support the goal of a healthy Urban Canopy in more than just words.

Thank you for your consideration

Sincerely

Jenny Wadman

5/13/2010

T.65

**Written Testimony Submitted for PC / UFC hearing on
Citywide Tree Project**

Submitted for 6/08/10 record

	Name	Organization	Date
66	Leitgeb, Brian	Columbia Edgewater Golf Course	5/18/10
67	Haney, Richard	Portland Fire & Rescue	5/25/10
68	Ross, Richard	Save Our Elms	6/7/10
69	Bassos, Alex	HAND	6/7/10
70	Netusil, Noelwah	Reed College	5/28/10
71	Gibbon, John		6/8/10

REC. 5/18/10

COLUMBIA EDGEWATER COUNTRY CLUB

May 10, 2010

City of Portland
Attention: Planning Commission
1900 SW Fourth Avenue, Suite 7100
Portland, OR 97201



Re: Proposed City-wide Tree Policy and Regulatory Improvement Project

Dear Commissioners:

Columbia Edgewater Country Club has been located at 2220 NE Marine Drive for over 85 years. CECC encompasses approximately 158 acres, and is surrounded by a mix of residential, industrial, marine and airport related properties. The purpose of this letter is to express our concern regarding the City's proposed tree regulations.

Trees within and surrounding CECC are important to the visual quality and functionality of our property as a golf course. We employ skilled professionals to maintain these trees and many other plant types to ensure that the CECC continues to reflect a high quality environment. With that said, we frequently assess the trees on site as part of our ongoing maintenance and prune, remove, relocate and replant trees that may present safety concerns, are needed to assist with the health of the tree. Temporary and permanent course modifications and the addition of accessory structures (ie. concessions, restrooms, etc) may also result in the relocation of trees and other vegetation.

Based on our initial review of the proposed code language released in February 2010, we were quite surprised and concerned with the significant amount of new and complex code as it could possibly be interpreted to relate to our current operations and maintenance practices. As an example, this code is so ambiguous, extensive and complex, it is possible that we could be required to hire consultants anytime we need to accomplish only the simplest of pruning or work within root/canopy area. In addition, permit review as proposed will result in additional time and cost that could become financially devastating in these difficult economic times, and create potential safety and liability issues. We strongly recommend that this permit process include more exemptions for normal maintenance and operations.

If some review is required, the city should include a streamlined permit process for large property owners such as the CECC. We understand the current proposal includes some form of 'programmatic permit' as provided in Section 11.300.070 for large public agencies. We feel that this approach is appropriate for our property, should any review be necessary, in an attempt to streamline the permit process and allow for the continued maintenance and operations of our property.

We understand the importance of trees and are supportive of the general goals of the project. However, we strongly urge you to reconsider adopting these overreaching regulations as currently proposed and encourage the concept of a programmatic permit process for large sites such as CECC. We look forward to discussing our thoughts on this process with staff as this project moves forward.

Thank you for the opportunity to comment on this important issue.

Brian Leitgeb
Columbia Edgewater Country Club President

T. 666



PORTLAND FIRE & RESCUE



Randy Leonard, Commissioner
Erin Janssens, Fire Marshal
Prevention Division
1300 SE Gideon Street
Portland, OR 97202
(503) 823-3700
Fax (503) 823-3969

May 25, 2010

Portland Planning Commission

RE: Title 11 draft; City Tree Code

Fire & Rescue applauds the City Tree Code improvement project, moving tree regulations from the many city titles and rules, and placing as many of those rules as practical into the new Title 11. The code consolidation will make it easier for City staff, the public, and developers to navigate tree rules. While Fire & Rescue is in agreement on the importance of trees to the City--the aesthetics, ecology, and heritage--because of our public safety mission, it is incumbent on us to insert some caution into the process. One truth about trees is that under fire conditions, they are fuel. If the purpose of the Title 11 is to preserve and protect trees, it is not a leap to provide tools to homeowners in the wildland interface areas to protect their homes, and therefore, their trees from fire.

The current draft of Title 11 allows for much more pruning on trees in preservation zones than Title 33. Looking at the issue through a fire safety lens, this is a good thing; the further a tree is from a burning structure, the less likely the fire will spread from the structure, to the tree, and to surrounding trees. Requiring that the pruning be done under permit provides the necessary balance between tree preservation and competing interests that could provide rationalizations to denude the City.

What Title 33 has, but this draft of Title 11 does not, is any allowance for permit exempt fire safety measures. National fire standards suggest that homes in the interface have defensible zones around structures of 30, 60, and 90 feet depending upon the climate, vegetation and topography. 33.430.080 contains fire safety provisions; it allows pruning of trees and shrubs within 10 feet of structures, and removing of branches on conifers within 30 feet of structures to a level of 6 feet from the ground when within the City's wildfire hazard zone; all without a permit. These wildfire mitigation measures are but a fraction of what national standards call for, but it is something.

If the current Title 11 draft comes into effect, the Title 33 language goes away and all pruning will have to be by permit. This sets fire safety back to where it was prior to 2006, when the current fire safety exemptions were approved. It puts the citizen in the odd position of having to go through a regulatory process to garner permission to even minimally protect their home. Further, it puts the City worker in the odd position of having to explain why this is appropriate. It's a tough position to defend. Therefore, Fire requests that the pruning allowance in 33.430.080 be carried forward into Title 11.

Concerning further provisions in the Title 11 draft, Fire has worked closely with Parks over that past few years to adopt future desired vegetation conditions in Oaks Bottom, Powell Nature Park, and Forrest Park that will help reduce the chance of catastrophic fire conditions on those properties. The programmatic permit outlined in 11.300 will be a great help in implementing these plans.

Fire takes no issue with the proposed change to Title 31, and changes to Title 24.95 aerial access provisions for 5 story wood frame structures.

If you would like further discussion on this matter, please do not hesitate to contact me.

Sincerely,

Richard Haney, Assistant Fire Marshal
Portland Fire & Rescue
503-823-3930
cc. Fire Marshal Janssens, AFM Jones

T. 67

June 8, 2010 Hearing

Portland Planning Commission

RE Proposed Amendments to Tree Code Title 11 .300, and 11.400
Norway Maple Street Trees

Dear Commissioners

Save Our Elms would like to offer amendments to the new Tree Code, to address the proposed "*citywide objective* [of] "*measured and paced eradication*" of Norway Maple street trees, among other designated nuisance plants. (Tree Code Commentary p 78). Since 1995, Save Our Elms has worked to protect and replant Portland's unique heritage of elms, maples and large canopy street trees in seven neighborhoods.

According to the Urban Canopy Report (2007, p17), Norway Maples are the City's "most important" street tree in numbers, leaf area, and canopy cover. They provide substantial environmental, social and economic benefits for the street system in many neighborhoods. Portland's streets only have an estimated 17% canopy cover now, while the Urban Forestry Action Plan (2007, p 2) calls for doubling this.

The Tree Code bans these major street trees, without a plan for their orderly replacement or maintaining street system canopy cover.. The Tree Code allows and invites removals of healthy younger Norway Maple street trees (less than 12") under Type A permits and prohibits replanting on large sections of Portland's streetscape where they now predominate. Without a mitigation plan, the Tree Code's objective of eradicating Norway Maple street trees could undermine the 2007 Urban Forestry Action Plan Goal 1, Outcome A, Enhanced Canopy.

Save Our Elms home base, Ladd's Addition, is a National Register Historic District. The adopted 1986 District Guidelines for Open Space (p 6-7) and the Street Tree Plan recognize mature elms and Norway Maples as a "unique natural treasure and a significant part of the district's character". This historic elm-maple streetscape is integral with the district's nationally renowned radial street and park plan. Since 1986, neighbors have planted hundreds of disease-resistant elms and Norway Maple cultivars.

We believe the amendments summarized below (See ATTACHMENT) would address citywide and historic district concerns:

I Develop a Citywide Norway Maple Street Tree Replacement Plan:

A. The Urban Forestry Commission will adopt, and the City Forester will develop and implement, a *Norway Maple Street Tree Replacement Plan* as part of the Urban Forest Plan, before fully applying the Tree Code nuisance tree provisions to Norway Maple street trees (planting and removal).

1. This plan and appropriate code amendments would assure the orderly replacement of Norway Maple street trees and canopy, by working with affected bureaus, neighborhoods, and interested groups.
- 2..Defer the full application of the nuisance Tree Code provisions to Norway Maple street trees (Planting and Removal) until a Replacement Plan is implemented. Neighborhood Tree Plans can be a tool to implement the Replacement Plan.

B. Amend relevant sections of the Code and tables, to include interim measures for removal or replanting Norway Maple street trees until the City has a Replacement Plan:

1. Process healthy Norway Maple street tree removal requests as a Type B or C permits.
2. Allow new planting and replacement of Norway Maples as infill plantings in existing Norway maple streetscapes as Type A permits.

II. Recognize the adopted Ladd's Addition Historic District Open Space guidelines and Street Tree Plan as part of the Tree Code.

1. Recognize the City adopted Ladd's Addition Historic District Open Space Guidelines in the Tree Code, which require replanting with species consistent with the "character, height, canopy, and spacing" of the original plantings, under a Ladd's Addition Street Tree Plan.
2. Recognize the current adopted Ladd's Addition Street Tree Plan. Allow the Historical Landmarks Commission to amend the plan, with the City Forester's concurrence and implementation, in consultation with community organizations and residents.

Sincerely, Richard N Ross

**Vice President, Save Our Elms
2041 SE Elliott Ave
Portland, Or 97214
503-807-0612**

CC:
Bureau of Planning and Sustainability, Roberta Jortner
Urban Forestry Division, Dave Mc Allister, Rob Crouch
HAND Neighborhood Assn., Alex Bassos, Linda Nettekoven
Historical Landmarks Commission Nicholas Starin
Urban Forestry Commission
Emily Hicks, Office of Commissioner Fish
Save Our Elms Board and Affiliates

Attachments

1. Draft Amendments to Proposed Title 11, Tree Code

Norway Maple Street Trees COMMENTARY Section 11.200-11.400

The Tree Code proposes a "citywide objective [of] "measured and paced eradication" of Norway Maple street trees, among other designated nuisance plants. (Tree Code Commentary p 78). According to the Urban Canopy Report (2007, p 17), Norway Maples are the City's "most important" street tree in numbers, leaf area, and canopy cover. They provide substantial environmental, social and economic benefits for the street system in many neighborhoods. Portland's streets only have an estimated 17% canopy cover now, while the Urban Forestry Action Plan (2007, p 2) calls for doubling this.

The Tree Code bans these major street trees, but proposes no plan for their orderly replacement or maintaining street system canopy cover. The Tree Code allows and invites removals of healthy younger Norway Maple street trees (less than 12") under Type A permits and prohibits replanting on large sections of Portland's streetscape where they now predominate. Under these conditions, the Tree Code's objective of eradicating Norway Maple street trees conflicts with the 2007 Urban Forestry Action Plan Goal 1, Outcome A, Enhanced Canopy.

The following section proposes that The Urban Forestry Commission should develop, adopt, and implement a *Norway Maple Street Tree Replacement Plan* as part of the Urban Forest Plan, before fully applying the Tree Code nuisance tree provisions to Norway Maple street trees.

Therefore, the following amendments should be made to proposed Chapter 11.200-11:400 to assure orderly transition, to allow interim measures for removal or replanting Norway Maple street trees, and to protect this resource until a Replacement Plan is in place. These amendments also acknowledge the significance of Norway Maples in defining the character of the streetscape in several historic districts Suggested **new text is in bold and highlights**, deletions are in brackets.

1. Modify proposed 11.200.050: Urban Forest Plan by adding new language to subsection B and by adding the following subsection D.

B. Roles. The City Forester, in consultation with the Urban Forestry Commission and City bureaus, is responsible for coordinating the development, maintenance, and implementation of the Urban Forest Plan. The City Forester will involve the Urban Forestry Commission to inform and solicit advice and recommendations. **When making decisions concerning street trees in historic or conservation districts, the City Forester shall also consult the Historical Landmarks Commission to inform and solicit advice and recommendations.** The City Forester will coordinate with City bureaus whose functions affect the urban forest. City Bureaus must participate with the City Forester and Urban Forestry Commission in developing and implementing the Plan. Working groups made up of representatives of those bureaus and groups who contribute to the management of the City's urban forest must be formed to develop citywide action plans to implement the Plan, and to monitor and report on progress.

11.200.050 D. Norway Maple Street Tree Replacement Plan,

- 1. The Urban Forestry Commission shall adopt, and the City Forester shall develop and implement, a Norway Maple Street Tree Replacement Plan as part of the Urban Forest Plan.**
- 2. The Replacement Plan, implementing actions, and related code amendments will assure the orderly replacement of Norway Maple street trees, streetscapes and canopy cover. The Plan shall be developed by the Urban Forestry Division, working with affected bureaus, neighborhoods, interested groups and individuals.**
- 3. The full application of the Title 11 nuisance plant provisions to Norway Maple street trees (Planting and Removal) shall be deferred until the Urban Forestry Commission adopts the Replacement Plan and implementing actions. Neighborhood Tree Plans (per 11.400.070.B4) can be used as a tool to implement the Replacement Plan.**

2. Modify proposed 11.300.020: Overview of Tree Permits

Table 300-2, Removal of Nuisance Trees

Tree Size	City and Street Trees		Private Trees	
	General	Resource Areas	General	Resource Areas
<6"	Type A	1-4 Type A, 5+ Type B	Not regulated	Not regulated
6 to <12"	Type A	1-4 Type A, 5+ Type B	Not regulated	1-4 Type A, 5+ Type B
12 to <20"	Type B	1-4 Type A, 5+ Type B	Type A	1-4 Type A, 5+ Type B
20"+	Type B	1-4 Type A, 5+ Type B	Type A	1-4 Type A, 5+ Type B
Any Heritage Tree	Urban Forestry Commission Review		Urban Forestry Commission Review	

- 1. Until the City adopts and implements a Norway Maple Street Tree Replacement Plan as an update to the Urban Forest Plan per 11.200.050, the PROPOSED AMENDMENTS TO TREE CODE from Save Our Elms 6-8-10 Page 2**

removal of healthy Norway Maple Street Trees outside of Resource Areas, shall be subject to Type B permits (all trees less than 20”), or to Type C permits (20” or larger), and applicable criteria and Mitigation Standards of Sections 11.400.080 and .090. In historic or conservation districts where the Norway Maple has been designated as an appropriate street tree, a Type C permit shall be required for the removal of healthy Norway Maple Street Trees, regardless of size.

Table 300-5, Other Tree Activities

Tree Activity	City and Street Trees	Private Trees (permits not required except as noted)
Nominating a Heritage Tree	UFC	Urban Forestry Commission
Planting	Type A	Native species required (c,p,v,e,s overlay zones, and greenway setback) Nuisance species prohibited for landscape, mitigation, and replacement
Pruning ¹	Type A	Type A Permit for limited pruning requests (c,p,v,e,s overlay zones)
Root Cutting ¹	Type A	Follow proper arboricultural practices
Miscellaneous ²	Type A	Follow proper arboricultural practices

¹ For emergency situations, permits must be applied for within 7 days following the tree pruning or root cutting activity.
² Miscellaneous activities include attaching lights, signs, artwork, or any other type of activity which may harm a tree.

3. Planting of Norway Maple Street Trees outside of Resource Areas shall be permitted subject to Type A procedure, until the City adopts and implements a Norway Maple Street Tree Replacement Plan, per 11.200.050. These plantings are intended to replace or infill existing plantings, and may be required to be disease resistant cultivars.

3. Modify proposed 11.400.060: General City Tree and Street Tree Overview of Tree Permits

11.400.060 General City Tree and Street Tree Permit Requirements

Table 400-1, Summary of City and Street Tree Permit Requirements

Tree Size	Removal Requests					Planting Pruning ¹ Root Cutting ¹ Attachment Misc.
	Healthy	Nuisance		Dead / Emergency ¹	Diseased / Dangerous	
		General	Resource Areas			
<6"	Type B	Type A	1-4 Type A, 5+ Type B	Type A	Type B	Type A
6 to <12"	Type B	Type A	1-4 Type A, 5+ Type B	Type A	Type B	Type A
12 to <20"	Type B	Type B	1-4 Type A, 5+ Type B	Type A	Type B	Type A
20"+	Type C	Type B	1-4 Type A, 5+ Type B	Type A	Type B	Type A
Any Heritage Tree	Subject to the requirements in Chapter 11.200					Type A

¹ For emergency removals, pruning, or root cutting, permits must be applied for within 7 days following the emergency work

2. Until the City adopts and implements a Norway Maple Street Tree Replacement Plan as an update to the Urban Forest Plan per 11.200.050, the removal of healthy Norway Maple Street Trees outside of Resource Areas, shall be subject to Type B permits (all trees less than 20”), or to Type C permits (20” or larger), and applicable criteria and Mitigation Standards of Sections 11.400.080 and 090. In historic or conservation districts where the Norway

Maple has been designated as an appropriate street tree, a Type C permit shall be required for the removal of healthy Norway Maple Street Trees, regardless of size.

3. Planting of Norway Maple Street Trees outside of Resource Areas shall be permitted subject to Type A procedure, until the City adopts and implements a Norway Maple Street Tree Replacement Plan, per 11.200.050. These plantings are intended to replace or infill existing plantings, and may be required to be disease resistant cultivars.

4. Modify proposed 11.400.070 Type A Tree Permits

B. Type A Planting Requests.

1. Nuisance Trees Prohibited. Pursuant to 11.700.050, Prohibited Actions, no tree listed in the City's Nuisance Plants List may be approved for planting or replacement.

Planting of Norway Maple Street Trees outside of Resource Areas shall be permitted subject to Type A procedure, until the City adopts and implements a Norway Maple Street Tree Replacement Plan, per 11.200.050. These plantings are intended to replace or infill existing plantings, and may be required to be disease resistant cultivars.

E. Type A Removal Requests. For any of the following requests, if the removal permit is granted, the City Forester will require the tree to be replaced, in accordance with Subsection F, below:

1. Nuisance Trees.

The City Forester will issue a permit if the applicant demonstrates that the tree is listed on the City's Nuisance Plants List and:single year.

Until the City adopts and implements a Norway Maple Street Tree Replacement Plan as an update to the Urban Forest Plan per 11.200.050, the removal of healthy Norway Maple Street Trees outside of Resource Areas, shall be subject to Type B permits (all trees less than 20"), or to Type C permits (20" or larger), and applicable criteria and Mitigation Standards of Sections 11.400.080 and 090. In historic or conservation districts where the Norway Maple has been designated as an appropriate street tree, a Type C permit shall be required for the removal of healthy Norway Maple Street Trees, regardless of size.

5. Modify proposed 11.400.080 Type B Tree Permits

B. Type B Removal Requests. For any of the following requests, if the removal permit is granted, the City Forester will require the tree to be replaced in accordance with Subsection C, below.

1. Nuisance Trees. The City Forester may issue a permit if the applicant

demonstrates that the tree is listed on the City's Nuisance Plants List, and:

c. Until the City adopts and implements a Norway Maple Street Tree Replacement Plan as an update to the Urban Forest Plan per 11.200.050, the removal of healthy Norway Maple Street Trees outside of Resource Areas, shall be subject to Type B permits (all trees less than 20"), and Healthy Tree criteria and Mitigation Standards of Sections 11.400.080B4 and 11.400.080 C. In historic and conservation districts where the Norway Maple has been designated as an appropriate street tree, a Type C permit shall be required for the removal of healthy Norway Maple Street Trees, regardless of size.

6. Modify proposed 11.400.090 Type C Tree Permits

B. Type C Removal Requests. Type C removal requests apply to requests to remove Priority Trees. Priority Trees are any healthy trees not listed on the City's Nuisance Plants List that are 20 inches and larger as well as Oregon oaks and Pacific madrone that are 6 inches and larger.

Until the City adopts and implements a Norway Maple Street Tree Replacement Plan as an update to the Urban Forest Plan per 11.200.050, the removal of healthy Norway Maple Street Trees outside of Resource Areas shall be subject to Type C permits (20" or larger), and the Priority Tree Removal Criteria and Mitigation Standards of Sections 11.400.090 B1 and 11.400.090C. In historic and conservation districts where the Norway Maple has been designated as an appropriate street tree, a Type C permit shall be required for the removal of healthy Norway Maple Street Trees, regardless of size.

City and Street Trees in Historic Districts COMMENTARY Section 11.400

The proposed Chapter 11.400 (City and Street Trees) does not recognize the significance of particular species of trees to the historic character of certain districts in the city. In Ladd's Addition Historic District, for example, American Elms and Norway Maples play a critical role in supporting the formal street plan by establishing a uniform line of trees down individual streets. It must be acknowledged that this historic streetscape, typical of the City Beautiful era, is in some ways inconsistent with contemporary theories concerning street trees. For one thing, it requires long rows of trees, a monoculture, at least along individual streets. For another, the species of trees may go out of fashion or be re-evaluated using a new lens.

The fact that we know more about trees than they knew over 100 years ago does not justify redefining an historic district by planting a different species of tree from the original street tree. The premise of an historic district is that it retains its archaic features. In such cases, unless there is a legitimate health or safety concern or the species of trees is threatened for some reason -as with the American Elm and Dutch Elm Disease - the original tree should be retained. Even minor deviations weaken the impact of historic street tree plantings. Using maples as an example, even similar cultivars have different forms, sizes and leaf colors. They bloom and shed their leaves on similar, but distinctly different, schedules. Substituting a brand new tree for a Norway Maple in Ladd's Addition will destroy the effect desired by the original planners of the neighborhood.

Because few historic or conservation districts outside Ladd's Addition are designated for their original street tree plantings or have adopted tree plans, the impact of preserving and continuing historic tree plantings on the city as a whole will be slight. The importance of preserving the historic quality of certain neighborhoods by continuing the existing street trees exceeds the negligible impact these trees could have on the city's ecology as a whole.

Therefore, the following amendments should be made to proposed Chapter 11.400. Suggested new text is in bold and highlights, deletions are in brackets.

1. Modify proposed 11.400.070 Type A Tree Permits

11.400.070 Type A Tree Permits

* * * *

B. Type A Planting Requests

4. Street Tree Planting Standards. The City Forester will maintain the Recommended List of Street Trees that may be planted in Streets. If another proposed variety of tree otherwise conforms to the City's Tree Standards then..... may allow an alternative tree .

In historic and conservation districts, the City Forester shall defer to adopted district guidelines related to street trees or a street tree plan, if existing, as adopted by the Historical Landmarks Commission with the concurrence of the City Forester.

* * * *

E. Type A Removal Requests. For any of the following requests, if the removal permit is granted, the City Forester will require the tree to be replaced, in accordance with Subsection F, below:

1. Nuisance Trees.

The City Forester will issue a permit if the applicant demonstrates that the tree is listed on the City's Nuisance Plants List and:single year.

In historic and conservation districts, where a nuisance tree is designated under adopted district guidelines or a street tree plan, the City Forester may only issue a removal permit under Type C permit procedures, and the Priority Tree Removal Criteria and Mitigation Standards of Sections 11.400.090 B1 and 11.400.090C

2. Modify proposed 11.400.080 Type B Tree Permits

* * * *

B. Type B Removal Requests. For any of the following requests, if the removal permit is granted, the City Forester will require the tree to be replaced in accordance with Subsection C, below.

1. Nuisance Trees. The City Forester may issue a permit if the applicant demonstrates that the tree is listed on the City's Nuisance Plants List and:

c. In historic and conservation districts, where a nuisance tree is designated under adopted district guidelines or a street tree plan, the City Forester may

only issue a removal permit under Type C permit procedures, and the Priority Tree Removal Criteria and Mitigation Standards of Sections 11.400.090 B1 and 11.400.090C.

3. Modify proposed 11.400.090 Type C Tree Permits

B. Type C Removal Requests. Type C removal requests apply to requests to remove Priority Trees. Priority Trees are any healthy trees not listed on the City's Nuisance Plants List that are 20 inches and larger as well as Oregon oaks and Pacific madrone that are 6 inches and larger.

In historic and conservation districts, where a nuisance tree is designated under adopted district guidelines or a street tree plan, the City Forester may only issue a removal permit under Type C permit procedures, and the Priority Tree Removal Criteria and Mitigation Standards of Sections 11.400.090 B1 and 11.400.090C.

4. Add Proposed Section 11.400.100

Ladd's Addition Historic District, Street Tree Guidelines and Plan

11.400.010 Ladd's Addition Historic District, Street Tree Guidelines and Plan

The following code provisions are largely derived from the adopted 1986 "Ladd's Addition Conservation District Guidelines." Similar provisions may be appropriate for other city historic or districts that have adopted Guidelines for Street Trees or Street Tree Plans.

A. Policy. Ladd's Addition's parks and open spaces work together with the radial street plan to create the district's special historic character. The rows of mature American Elms and Norway Maples are a unique natural treasure and a significant part of the district's character, which subsequent replacement plantings have maintained. Except in cases like the American Elm, where the Dutch Elm Disease requires the substitution of a disease-resistant species of elm, the original historic tree species shall be retained. Where a substitution is required, the replacement cultivar shall resemble the original species as much as possible, and shall be consistent with the character, height, canopy and spacing of a street's original plantings, the width of the parking strip, and the scale and function of the street within the district. In no event shall a species of tree not used as a street tree in the city when Ladd's Addition was developed (c 1910) be used as a replacement tree for the original historic tree species.

B. Street Tree Plan. The Street Tree Plan adopted as part of the "Ladd's Addition Conservation District Guidelines" as amended, shall govern street tree selection and replacement on each street and shall supersede any nuisance tree prohibition contained in any other part of this code. The Historical Landmarks Commission must approve any changes to the plan, with

the City Forester's concurrence and implementation, in consultation with affected community organizations and residents.

C. Street Tree Conservation, Removal and Maintenance. All prudent measures should be taken by the City, utility companies and property owners to preserve original street trees, including the American Elms and Norway Maples. The City shall notify the Hosford-Abernethy Neighborhood Association (HAND) and property owners within 150 feet of requests for removal permits. Removal is warranted only when a danger to the public exists. Sidewalk repairs and other excavation or construction near trees shall preserve tree roots. Pruning practices shall respect natural growth habits. Topping, shearing and pollarding of street trees is prohibited.

D. Street Tree Replanting. In the event a street tree must be removed, a replacement tree shall be replanted. On all frontages, replanting of replacement or missing street trees shall be done in accordance with the Ladd's Addition Street Tree Plan.



HOSFORD-ABERNETHY
NEIGHBORHOOD DEVELOPMENT ASSOCIATION

June 7, 2010

Roberta Jortner
City of Portland
Bureau of Planning and Sustainability
1900 SW 4th Ave
Portland, Oregon 97201-5380

In an earlier letter, the Hosford Abernethy Neighborhood Association (HAND) expressed support for the major elements described in the new Portland tree code. After further review, however, we are very concerned about the new prohibitions included in the code on "non-native" trees described as nuisance species. In particular, the new code would prohibit the planting of Norway Maples, which is among the most popular street trees in the city. This policy appears to be in conflict with Metro's "Green Streets" recommendations which list the Norway Maple as a recommended tree for streetscape plantings. This tree, and several of its related cultivars have become a significant part of our neighborhood's "greening" effort.

We have specific concerns about how this new regulation supersedes and invalidates the landscape guidelines that are in codified by the Landmarks Commission for the Ladd's Addition Historic District. The neighborhood has worked with the Forestry Division, Friends of Trees, and Save Our Elms over the past twenty years to address the integrity and maintenance of the landscape plan, which includes a street tree plan developed by the Ladd Estate Company, and the Ladd's Addition parks designs by Portland Parks Supt. and former Olmsted associate, E.T. Mische, about 100 years ago. The historic value of this unique neighborhood is defined by its street pattern and the landscape plan that complements it. In the past 20 years, our neighborhood has invested over \$200,000 in preserving (through inoculation and pruning) and re-planting these street trees. We have attempted to honor the intent of the original plan wherever possible. As the original design did not foresee the ravages of Dutch Elm Disease or Verticillium Wilt on the design, we have worked with our partners to find suitable replacement species only where necessary. In the last twenty years, we have planted several hundred trees in Ladd's Addition, including many Norway Maples and Elm hybrids in an effort to preserve the continuity described in the landscape plan.

A BES document was developed in November 2005 in response to City Council order 36360 (Appendix A): "Invasive Plant Lists". In the Executive Summary of the document it states "*This report describes invasive plant management program elements that should be added to existing City programs to maintain existing high quality natural areas and to remove invasive plants in more heavily infested areas.*"

The report later states in section 5.4.1 (Inventory): "within the 92,000 acre City limits (inventory included vegetated areas >0.5 acre)." Areas under 1/2 acre were not included in the inventory of areas with invasive plant species.

HOSFORD-ABERNETHY NEIGHBORHOOD DEVELOPMENT ASSOCIATION
PO Box 15033, Portland, OR 97293 | www.handpdx.org | chair@handpdx.org

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HOSFORD-ABERNETHY
NEIGHBORHOOD DEVELOPMENT ASSOCIATION

It appears that the new City Tree Ordinance has taken the all the trees included in Appendix A of this 2005 document which concerned invasive plant removal from "open" "natural" areas (>0.5 acres) and applied it to "urban" "controlled" neighborhood areas without review.

We ask that the Planning Commission and Forestry Division delay implementation of the city-wide ban on Norway Maples and other "nuisance" trees until a well-defined alternative plan can be developed. We further ask that the street tree provisions of the Ladd's Addition Historic District (as approved by the Landmarks Commission) be preserved in city code with modifications to the original design only implemented in the event that the viability of the designated species is threatened by disease or insects. As an example, trees designated for American Elm planting will be re-planted with a disease-resistant elm variety. Maples that have died due to Verticillium Wilt in the soil may be replaced with a species or cultivar that is resistant to the fungus, but grows to approximate the shape, color and scale of the other maples on the street.

While we support the general goals Title 11 to increase the urban canopy, we are not convinced that the outright ban on the Norway Maple is necessary or desirable. In the case of our neighborhood's historic district, it will undo over one hundred years of thoughtful landscape design.

Yours sincerely,

Alexander Bassos
HAND Chair



ECONOMICS DEPARTMENT

REED COLLEGE

3203 SOUTHEAST WOODSTOCK BOULEVARD
PORTLAND, OREGON 97202-8199

May 28, 2010

Portland Commission/Urban Forestry Commission
1900 SW 4th Avenue
Suite 7100
Portland, Oregon 97201

Dear Members of the Planning Commission and Forestry Commission:

For the past ten years my research program has focused on factors that influence the sale price of single-family residential properties in Portland, Oregon. Peer-reviewed published articles include an analysis of environmental zoning's effect on the sale price of properties and how proximity to open spaces such as golf courses, natural areas, urban parks influence the sale price of properties. Recent research is focusing on tree canopy and walkability.

I have reviewed the document "Citywide Tree Project: Frequently Asked Questions" and agree with a statement made in that document that "trees increase property values." This is based on work done by Dr. Geoff Donovan at the USDA Forest Service, PNW Research Station, that focuses on individual trees and on my own work that examines how a property's sale price is influenced by the amount of tree canopy in its surrounding neighborhood, which I define as the area within $\frac{1}{4}$ mile of a property.

In a peer-reviewed article in the May 2010 issue of *Land Economics*, I estimate the per property benefit from having 25% tree canopy coverage, the current average in the Portland area, is between \$4,600 and \$13,500. My estimates show that the per property benefit from having 35% tree canopy coverage, which is close to the stated goal of 33% tree canopy coverage, is between \$6,100 to \$14,400. These estimates are in 2010 dollars. A copy of this article is included with this written testimony.

A current project is looking at the combined effect of land cover and walkability using an index developed by the Bureau of Planning and Sustainability for its 20-minute neighborhood project. Results are preliminary, but we are finding an important interaction effect between land cover and access to urban amenities, that is, while property owners value access to urban amenities, and are willing to pay a premium to live in neighborhoods with these amenities, they are willing to pay even more if those neighborhoods also have tree canopy. This provides some insight into the likely effects of increasing tree density, as proposed, from 7 to 16% in areas that include commercial development.

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I end my testimony with a reminder about the limitations of my research. Our estimates only reflect the benefits perceived by individual property owners. This means that our estimates may not capture the other benefits generated by trees such as their ability to sequester carbon, reduce the heat island effect, reduce stormwater runoff, provide wildlife habitat, etc. Our estimates, therefore, should be regarded as lower bounds on the total benefits of trees.

Sincerely,

Noelwah R. Netusil

Noelwah R. Netusil, PhD

Stanley H. Cohn Professor of Economics

Estimating the Demand for Tree Canopy: A Second-Stage Hedonic Price Analysis in Portland, Oregon

Noelwah R. Netusil, Sudip Chattopadhyay, and Kent F. Kovacs

ABSTRACT. *The benefits of large patches of tree canopy are estimated by applying a hedonic price model to the sale of single-family residential properties in Portland, Oregon. The first-stage analysis provides evidence of diminishing returns from increasing tree canopy past a certain level. The second-stage analysis uses a survey of property owners' preferences and socioeconomic characteristics to overcome the problem of endogeneity. Average benefit estimates for the mean canopy cover within 1/4 mile of properties in the study area, using the second-stage model, are between 0.75% and 2.52% of the mean sale price. (JEL Q21, Q51)*

I. INTRODUCTION

Large contiguous patches of tree canopy are considered to be an important part of an urban environment. In addition to the benefits received by private property owners, such as shade and privacy, these areas provide wildlife habitat, improve air quality, reduce runoff and flooding, lower noise levels, and moderate climate.

The Portland metropolitan area is highly urbanized and development is constrained by an urban growth boundary. Despite these pressures, the percentage of tree canopy in the city of Portland increased between 1972 and 2002 (Poracsky and Lackner 2004). This increase is attributed to a natural environment that is conducive to growing trees, Oregon's land-use laws, Portland's environmental zoning regulations, land purchases by the regional government, and planting efforts by non-profit organizations (Poracsky and Lackner 2004).

Portland's Urban Forestry Management Plan (Portland Parks and Recreation 2004, 12) lists "protect, preserve, restore, and expand Portland's urban forest" as one of its goals. The effect of this objective on the sale price of single-family residential properties is unknown but is important to assess since the incentives for private property owners to preserve tree canopy may—or may not—be consistent with this goal.

This paper estimates the effect of tree canopy located on single-family residential properties, and in the area within 1/4 mile of these properties, on their sale price. In addition to estimating marginal effects this paper estimates, for the first time, the per-property benefits of nonmarginal changes in tree canopy using a second-stage hedonic price model. The second-stage model involves estimating an inverse demand curve for the percentage of tree canopy, which is necessary for measuring the per-property benefits of nonmarginal changes in tree cover. These estimates are provided for existing levels of tree canopy and for several hypothetical increases in tree canopy coverage.

II. LITERATURE

Several studies have examined the relationship between open spaces and the sale

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price of single-family residential properties in Portland, Oregon (Bolitzer and Netusil 2000; Lutzenhiser and Netusil 2001; Mahan, Polasky, and Adams 2000; Netusil 2004a, 2005b). Tree canopy on a property and in the surrounding neighborhood is represented by a series of dummy variables in one paper (Netusil 2005a) and captured indirectly as a characteristic of natural area parks and forested wetlands in the other papers (Bolitzer and Netusil 2000; Lutzenhiser and Netusil 2001; Mahan, Polasky, and Adams 2000).

Multiple hedonic studies have found that property values increase if trees are located on a property (Anderson and Cordell 1985; Dombrow, Rodriguez, and Sirmans 2000; Morales 1980). Other hedonic studies have focused on the relationship between property values and forested areas in the surrounding neighborhood (Tyrvaïnen and Miettinen 2000), with some studies finding negative effects (Garrod and Willis 1992; Geoghegan, Wainger, and Bockstael 1997; Kestens, Theriault, and Rosiers 2004; Tyrvaïnen 1997).

Tyrvaïnen (1997) used apartment sales in Joensuu, Finland, to estimate how their sale price is influenced by distance to the nearest wooded recreation area, nearest forested area, and the relative amount of forested areas in the housing district. Sale prices are estimated to increase with proximity to wooded recreation areas and with increases in the amount of forested areas in the housing district. However, the sale price of apartments is found to increase as the distance from a forested area increases. The author attributes this result to the shading effects from dense forests in the study area.

In a related study, Tyrvaïnen and Miettinen (2000) estimated that a 1-km increase in the distance to the nearest forested area leads to an average 5.9% decrease in the sale price of residential properties in the district of Salo in Finland. Dwellings with a view of forests were found, on average, to be 4.9% more expensive than dwellings with similar characteristics.

Garrod and Willis (1992) used observations on properties located adjacent to

Forestry Commission land across Britain to estimate a first-stage model that includes three tree categories and a second-stage model of the demand for broadleaved woodland. An increase in the proportion of Forestry Commission land with broadleaved trees is estimated to increase a property's sale price, while an increase in mature conifers is found to reduce sale prices. The double-log functional form used in the second-stage model, which uses a multiple market approach, results in an income elasticity estimate for the proportion of broadleaved woodland of 0.82 and an own price elasticity of -1.76 .

The only second-stage hedonic model attempted for Portland, Oregon, is described by Mahan, Polasky, and Adams (2000). While the authors find evidence of market segmentation, they were unable to get reliable estimates of the demand curve for size of the nearest wetland.

III. STUDY AREA, PROPERTY CHARACTERISTICS, AND SURVEY DATA

The study area includes 91,250 acres of Portland, Oregon, located within Multnomah County (Figure 1). The study area is highly urbanized with an average lot size of 7,043 square feet. Between January 1, 1999, and December 31, 2001, there were 30,015 arms-length single-family residential property sales in the study area; these transactions are the core part of the data set used for the first-stage hedonic price model. Sale price and structural information were obtained from the Multnomah County assessor (2002).¹ Sale prices were adjusted to 2000 dollars using the *Consumer Price Index: All Urban Consumers* (Bureau of Labor Statistics 2002). Table 1 contains a complete list of explanatory variables used in this analysis; more detailed information about the data set is provided by Netusil (2005a). Properties on the west side (NW and SW) have a higher mean sale

¹ Assessment and taxation property records, January 1997 to June 2002, Multnomah County Assessor's Office.

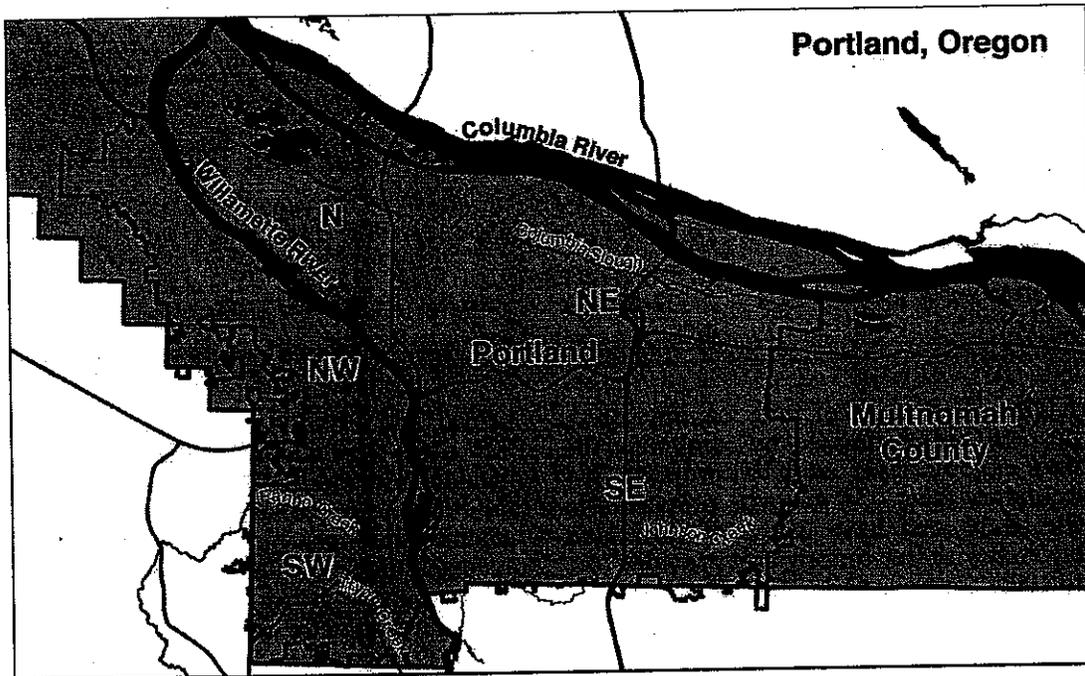


FIGURE 1
STUDY AREA

price, are located in census tracts with higher median incomes, and have a higher percentage of tree canopy on the property and in the area within $\frac{1}{4}$ mile of the property than properties located east of the Willamette River (Table 2).

The tree canopy variables were generated using a canopy cover layer derived from satellite images (Metro Data Resources

Center 2006). The canopy cover layer used a minimum mapping unit of 1 acre and categorized canopy cover based on the amount of coverage provided by the crowns of trees. For this study we focus on canopy that provides between 76% and 100% coverage, that is, patches of tree canopy of 1 acre or larger where canopy crowns overlap and cover 76% to 100% of the patch.

TABLE 1
EXPLANATORY VARIABLES

Property variables	Lot square footage, building square footage, garage square footage, total number of bathrooms, number of fireplaces, age, structure (1 story, 1 story unfinished attic, 1 story unfinished attic and basement, 1 story with finished basement, 1 story with finished attic, 1 story with finished attic and basement, 1 ½ story, 1 ½ story with finished basement, 2 story or 2 story with finished basement), base zoning (rural, low-density residential, medium density residential, high density residential, light commercial, heavy commercial, light industrial, or open space), distance to nearest commercial district, distance to nearest industrial district
Location variables	Quadrant (north, northeast, northwest, southwest, southeast); quadrant * distance to central business district
Property amenity variables	Percentage of tree canopy on the property
Percentage of area within $\frac{1}{4}$ mile of properties with amenities	Percentage of area within $\frac{1}{4}$ mile of property with: tree canopy, wetlands, river, stream, and slope equal to or exceeding 25%

TABLE 2
SUMMARY STATISTICS (STANDARD DEVIATIONS IN PARENTHESES)

	Combined	NW	SW	SE	NE	N
Mean real sale price (2000)	\$175,160	\$443,588	\$255,965	\$152,679	\$168,894	\$125,090
Mean median income (census tract 2000)	\$45,985	\$84,834	\$63,790	\$41,145	\$45,216	\$37,148
Mean lot size (ft ²)	7,043	13,626	10,022	6,788	6,310	5,327
Mean percentage of tree canopy on the property	3.48 (14.44)	21.64 (31.26)	16.02 (28.56)	1.22 (7.89)	1.00 (7.22)	0.40 (4.67)
Mean percentage tree canopy within 1/4 mile of properties	7.21 (13.29)	40.26 (20.12) Max: 90	27.03 (17.83) Max: 86	3.86 (7.62) Max: 85	2.53 (4.80) Max: 68	2.66 (3.76) Max: 29
Observations	30,015	767	3,879	11,980	9,597	3,792

The percentage of tree canopy on a property was estimated by combining the tree canopy layer with a property tax boundary layer. On average, properties in the study area have 3.48% of their land covered with tree canopy that provides 76% to 100% coverage and is part of a patch that is 1 acre or larger. This is because much of the study area has no tree canopy at the high-level of coverage of 76% to 100%. In each area (NW, SW, SE, NE, N) there were properties completely covered with tree canopy and properties with no tree canopy.

Tree canopy within 1/4 mile of a property can be located on privately or publicly owned land. The majority of tree canopy for property sales in the data set is on privately owned land. North Portland is an exception with 1.25% and 1.41% of land covered by privately and publicly owned tree canopy, respectively (Table 3).

The second-stage hedonic price model uses socioeconomic and perception variables from a survey to estimate the inverse demand function; this function is then used to calculate the benefits of nonmarginal changes in tree canopy coverage. In the fall of 2005, a packet containing an eight-page survey, a cover letter, a map of the Portland-area highlighting seven regional parks, and a postage-paid return envelope was mailed to a random sample of 1,200 properties selected from the 2001 property sales.² Of the 1,141 deliverable surveys, 42% (479) were re-

turned, and out of the 479 surveys returned 92% (440) were useable in the second-stage hedonic price model. The survey sample and the Portland population have similar mean income and age, but the sample is, on average, more educated (Table 4).

The survey asked respondents for (1) their perception of attributes of Portland parks, (2) their use of prominent Portland parks,³ (3) their willingness to pay for a program to purchase and maintain a large regional park, (4) the features of their choice of residence, and (5) their socioeconomic characteristics. The perception variables of the attributes of Portland parks are from nine-scale Likert-type questions that ask about the influence of park attributes, such as tree canopy, on housing choice. The socioeconomic variables include age, education, income, and the number of family members in the household.

Table 4 includes summary statistics for the variables used as demand shifters and/or as instruments in the second-stage hedonic model. The section of our paper describing the estimation of the inverse demand function explains the hypothesized relationship between these variables and the demand for tree canopy.

IV. HEDONIC PRICE METHOD: FIRST- AND SECOND-STAGE MODELS

The first-stage hedonic price model relates the sale price of properties to their structural

² For additional information on the survey see Kovacs and Larson (2008).

³ These include Forest Park, Mount Tabor, Tryon Creek State Park, Willamette Park, and Powell Butte.

TABLE 3
TREE CANOPY WITHIN 1/4 MILE OF PROPERTIES

	Combined	NW	SW	SE	NE	N
Percentage of tree canopy	7.21	40.26	27.03	3.86	2.53	2.66
Percentage on privately owned land	5.55	32.97	22.41	2.81	1.66	1.25
Percentage on publicly owned land	1.66	7.29	4.63	1.05	0.97	1.41

characteristics, neighborhood amenities, and location. While estimates for marginal changes in attributes can be derived from the first stage, the second stage is needed to estimate per-property benefits from non-marginal changes.

Rosen (1974) proposed that marginal prices from the first stage be used in a second-stage model to estimate the demand curve for the attribute of interest. However, for reliable estimation of the second stage, the inverse demand function must address two important econometric issues: identifi-

cation of the second-stage demand parameters from the first-stage parameters, and endogeneity of the price and level of the attribute.

Problems with parameter identification arise because the attributes of the composite good cannot be unbundled, resulting in a nonlinear hedonic price function. Consequently, the same set of information is used for the first and second stages—leading to an identification problem unless additional information or structure is included in the second-stage model. Ekeland, Heckman,

TABLE 4
DEFINITIONS AND SUMMARY STATISTICS OF HOMEOWNER CHARACTERISTICS

Variable	Definition	Sample Mean	Sample Std. Dev.	2006 Population Mean ^a	Demand Shifter	2SLS Instrument
AGE	Age	40.76	10.30	37.1	X	X
EDUCATION	Years of schooling	16.75	2.42	14.26	X	X
INCOME	Annual family income	\$77,352	\$44,086	\$76,550	X	X
SITETIME	The sum of the average on-site time spent per trip at five natural parks	194.41	148.56		X	X
AGE14	Number of family members younger than 14	0.57	0.90			X
AGE1425	Number of family members between 14 and 25	0.16	0.53			X
AGE2540	Number of family members between 25 and 40	1.06	0.89			X
AGE4060	Number of family members between 40 and 60	0.55	0.79			X
AGE60	Number of family members older than 60	0.08	0.35			X
PRKVIEW	Importance of view of park in housing choice	3.97	2.49			X
PRKTC	Importance of tree canopy at park	6.35	2.06			X
PRKHT	Importance of hiking trails at park	6.03	2.21			X
FRSTTIME	Average on-site time spent per trip at Forest Park	69.69	63.37			X
TBRTIME	Average on-site time spent per trip at Mount Tabor	52.37	49.76			X
PBTIME	Average on-site time spent per trip at Powell Butte Park	23.43	46.64			X
TCKTIME	Average on-site time spent per trip at Tryon Creek Park	26.92	46.80			X

^a The total population of Portland, Oregon, in 2006 was 539,950. Population summary statistics are from the U.S. Census Bureau's American Community Survey, 2006 (U.S. Census Bureau 2008).

and Nesheim (2004) provide an interesting theoretical discussion of the identification issue, suggesting that the nonlinearities of the hedonic model be used to nonparametrically identify the structural parameters. Endogeneity arises because the marginal price of an attribute, and its level, are simultaneously determined. Under these conditions ordinary least squares (OLS) leads to inconsistent estimation of the second-stage parameters, but two-stage least squares (2SLS) will produce efficient estimates if the instruments used are correlated with the observed levels of the attribute but uncorrelated with the unobserved homeowner's tastes.

As in previous studies (Chattopadhyay 1999), we identify the second-stage parameters using functional-form restrictions, specifically, a quadratic model for the first-stage hedonic price function, and linear and double-log models for the second-stage inverse demand functions. To overcome endogeneity bias we use individual-level survey responses and socioeconomic characteristics of a randomly selected group of property owners who purchased their homes in 2001. While the first-stage hedonic price function uses all 30,015 transactions, the estimation of the inverse demand function involves combining the information derived from the first-stage results with survey responses from a relatively small subset of property owners: 440 observations for the linear model and 377 for the double-log model. We expect that this aspect of the estimation will provide additional structure to the second-stage estimation and a strong set of instruments for efficient 2SLS estimation of the inverse demand parameters.

V. RESULTS

First-Stage Hedonic Price Model

Our a priori expectation is that tree canopy will have either a positive but diminishing effect on a property's sale price, or will increase a property's sale price to a maximum point past which increases in tree

canopy will cause a property's sale price to decline. Two models were developed to explore these expectations; the natural log of a property's real sale price was used as the dependent variable in both models.

In the first model, the percentage of tree canopy on a property, and within $\frac{1}{4}$ mile of a property, is represented by a quadratic function, while the natural logs of these variables are used in Model 2. To preserve observations, the minimum amount of tree canopy on each property, and within $\frac{1}{4}$ mile of each property, was set at 0.1% for Model 2, that is, observations with zero tree canopy for either (or both) categories were recoded to 0.1%—an approach justified by Smith and Cicchetti (1974) and Johnson and Rausser (1971). Of the 30,015 observations in the data set, there are 9,353 observations with no tree canopy within $\frac{1}{4}$ mile of the property and 27,583 properties with no tree canopy on the property.

The results from both models are presented in Table 5. The estimated coefficients for the structural, amenity, and location variables are consistent with those of other studies (Netusil 2005a, 2005b). The estimated coefficients on home characteristics (lot square footage, building square footage, etc.), house style (one story, one story with finished basement, etc.), base zoning (low residential, medium residential, etc.), distance to the central business district, and nearest commercial and industrial districts are not included in Table 5. Full results are available from the authors. In Model 1, 40 of the 52 explanatory variables are significant at the 5% level, while in Model 2, 36 of the 46 explanatory variables are significant at the 5% level. In Model 1, the percentage of tree canopy that is estimated to have the largest impact on a property's sale price is approximately 18%.⁴ The estimated coefficient on Model 2 is significant and negative, implying that the optimal tree canopy coverage on a property is zero, on average.

⁴ This estimate is derived by solving the quadratic equation for a maximum.

TABLE 5
FIRST-STAGE MODEL ESTIMATED COEFFICIENTS AND ROBUST STANDARD ERRORS

	Model 1 Quadratic	Model 2 Natural Log
Percentage of tree canopy on the property	0.00046 (0.00035)	
Percentage of tree canopy on the property squared	-1.28e-05*** (4.42e-06)	
Percentage of tree canopy within 1/4 mile of the property: N	0.00767*** (0.0018)	
Percentage of tree canopy within 1/4 mile of the property: NW	-0.0140*** (0.00234)	
Percentage of tree canopy within 1/4 mile of the property: NE	-0.0049** (0.0021)	
Percentage of tree canopy within 1/4 mile of the property: SW	-0.0080*** (0.0019)	
Percentage of tree canopy within 1/4 mile of the property: SE	-0.00082 (0.00187)	
Percentage of tree canopy within 1/4 mile of the property squared: N	-0.00024** (0.000104)	
Percentage of tree canopy within 1/4 mile of the property squared: NW	0.000269*** (0.000105)	
Percentage of tree canopy within 1/4 mile of the property squared: NE	0.000132 (0.000111)	
Percentage of tree canopy within 1/4 mile of the property squared: SW	0.000248** (0.000104)	
Percentage of tree canopy within 1/4 mile of the property squared: SE	0.000134 (0.000104)	
Percentage of area within 1/4 mile of property with wetlands	-0.0008864 (0.0013852)	-0.0009005 (0.0013853)
Percentage of area within 1/4 mile of property with rivers	0.0072869 (0.0006611)***	0.0073019 (0.0006615)***
Percentage of area within 1/4 mile of property with streams	-0.0278367 (0.0076645)***	-0.018638 (0.00738)** -0.004977*** (0.001786)
Natural log of percentage of lot with tree canopy		0.018990*** (0.003931)
Natural log of percentage of area within 1/4 mile of property with tree canopy		-0.083126*** (0.012220)
Natural log of percentage of area within 1/4 mile of property with tree canopy: NW		-0.008506* (0.004943)
Natural log of percentage of area within 1/4 mile of property with tree canopy: NE		-0.022236*** (0.006473)
Natural log of percentage of area within 1/4 mile of property with tree canopy: SW		0.005410 (0.004411)
Natural log of percentage of area within 1/4 mile of property with tree canopy: SE		
Observations	30,015	30,015
R ²	0.7554	0.7546

* Significant at 10%; ** significant at 5%; *** significant at 1%.

To test for the presence of spatial error autocorrelation in the first-stage hedonic regression model, we carry out Moran's *I*-test, separately, for the data from 1999, 2000, and 2001. The results of the tests are as follows:

- 1999 data: Moran's *I*-statistic = 0.3956, *p*-value = 0.01 (*n* = 9,913)
- 2000 data: Moran's *I*-statistic = 0.4131, *p*-value = 0.01 (*n* = 9,537)

- 2001 data: Moran's *I*-statistic = 0.3716, *p*-value = 0.01 (*n* = 10,474)

The tests indicate the presence of statistically significant spatial error autocorrelation for each year of the data. However, it remains unclear whether the spatial error process is due to spatial dependence or spatial heterogeneity. An appropriate spatial lag model can correct for spatial dependence, but spatial heterogeneity can

TABLE 6
 IMPLICIT PRICES FOR TREE CANOPY WITHIN 1/4 MILE OF PROPERTIES

	Number of Observations	Observations with Negative Implicit Prices Model 1: Quadratic	Maximum or Minimum of Quadratic Function	Observations with Negative Implicit Price Model 2: Natural Log
NW	767	767	97.36 (min)	767
SW	3,879	1,219	16.80 (min)	3,879
SE	11,980	176	33.32 (max)	0
NE	9,597	219	13.31 (max)	0
N	3,792	45	16.22 (max)	0
Total	30,015	2,426		4,646

be the result of error heteroskedasticity (Anselin and Bera 1998).

Correcting for spatial dependence involves specification of an appropriate spatial lag model (Anselin et al. 1996; Anselin and Bera 1998). Addressing spatial dependence requires at least two years of cross-sectional data that are temporally separated. This enables testing of the stability and asymptotic validity of the spatial lag parameters to determine the appropriate spatial lag specification to correct for spatial dependence (Anselin 2000). Unfortunately, our home sale data are for three consecutive years and, as such, do not enable us to specify a statistically accurate spatial lag model. A recent study that compares implicit prices of a hedonic price model with and without spatial dependence finds that spatially corrected estimates of implicit prices are found to be nearly the same as those obtained by OLS (Mueller and Loomis 2008). We address error heteroskedasticity, which could be the result of spatial heterogeneity, by estimating the regressions with robust standard errors (White 1980). In large samples, like the present case, heteroskedasticity-robust estimation can take care of the spatial clustering effect that is often encountered when using housing data (Anselin and Bera 1998).

Marginal implicit prices were derived using the results presented in Table 5. The estimated coefficients are consistent with the a priori expected relationship between the percentage of tree canopy within 1/4 mile of a property and its sale price in Model 1 for properties in SE, NE, and N Portland. However, increases in tree canopy up to 16.80% in SW Portland,

and 97.36% in NW Portland, are estimated to decrease the sale price of properties located in those areas (Table 6).

The estimated coefficients in Model 2 are consistent with a priori expectations for properties in SE, NE, and N Portland, but properties in NW and SW Portland are estimated to experience a decline in sale price from increases in tree canopy. Negative marginal implicit prices in NW and in SW Portland make intuitive sense since further increases from already large amounts of dense tree canopy within 1/4 mile of properties may block highly desirable views of mountains, city lights, and the Willamette River.

Inverse Demand Function (Second-Stage Hedonic Price Model)

The marginal implicit prices estimated in the first stage are used as the dependent variable in the estimation of the inverse demand function. Since the marginal implicit price of tree canopy and the percentage of tree canopy are simultaneously determined, instruments need to be used that are correlated with the observed levels of the attribute, but uncorrelated with the unobserved homeowner's tastes to avoid endogeneity bias.

Perception variables of park attributes such as view, tree canopy, and hiking, and on-site time variables for visits to natural parks, such as SITETIME, reflect respondents' preferences for parks. The demand for tree canopy near a property is likely related to these preferences because parks are a logical substitute for tree canopy near

TABLE 7

ESTIMATED COEFFICIENTS: QUADRATIC FIRST STAGE,
LINEAR SECOND STAGE (STANDARD ERRORS
IN PARENTHESES)

%TREE_CANOPY	-20.35*** (4.58)
INCOME	0.0001071 (0.00047)
AGE	2.49 (2.05)
EDUCATION	-192.55** (81.47)
EDUCATION_SQUARED	5.85** (2.41)
SITETIME	-0.1229 (0.143)
Constant	2,150.48*** (695.58)
R ²	0.2719
Observations	440

** Significant at 5%; *** significant at 1%.

a home, that is, homeowners who have little or no tree canopy on or near their property may make greater use of these parks.

Socioeconomic variables such as age, education, income, and the number of young children in a household are also related to the demand for tree canopy. Individuals who are older may have a preference for more tree canopy near their homes because they have more time available for passive recreation activities such as bird-watching; those with more education may desire neighborhoods with more tree canopy because there is a greater understanding and appreciation of the ecosystem services of tree canopy. Income may increase the demand for tree canopy near a home because of a greater ability to spend on amenities, while the number of family members in a household of different age groups influences household activities.

There was no a priori expectation about the functional form for the second-stage model, so two models were estimated: linear and double-log. We retained the negative marginal implicit prices estimated in the first-stage models in the linear model since these appear to be valid estimates for the study area. Other authors have taken a similar approach, although some authors have set these prices equal to zero or dropped these observations entirely (Zabel and Kiel 2000).

Results from the second-stage linear model are presented in Table 7. The estimated coefficient on the percentage of tree canopy is negative and significant. Income

TABLE 8

ESTIMATED COEFFICIENTS: QUADRATIC FIRST STAGE,
DOUBLE-LOG SECOND STAGE (ROBUST STANDARD
ERRORS IN PARENTHESES)

LN_%TREE_CANOPY	-0.1682*** (0.0423)
LN_INCOME	0.1720* (0.0972)
LN_AGE	0.1927 (0.1825)
LN_EDUCATION	-0.5539 (0.3455)
LN_SITETIME	-0.0937** (0.0455)
Constant	5.409*** (1.569)
R ²	0.2161
Observations	377

* Significant at 10%; ** significant at 5%; *** significant at 1%.

and age are positive, as expected, but not significant. Education, which is modeled as a quadratic, reaches a minimum at 16.46 years, which is close to the average education level in the survey data set, but much higher than the average education level in Portland. The availability of a substitute for tree canopy within 1/4 mile of a property is measured by SITETIME, the sum of the average on-site time spent per trip at five natural parks in the Portland-area. The estimated coefficient on this variable is negative, as expected, but is not significant.

Table 8 contains the results from the double-log model. For this model it is assumed that the minimum tree canopy within 1/4 mile of each observation is 0.1%; observations with a first-stage negative marginal implicit price are dropped, which decreases the number of observations to 377. The estimated coefficient on tree canopy is negative and significant: a 1% increase in tree canopy within 1/4 mile of a property is estimated to decrease the implicit marginal willingness-to-pay for tree canopy by 0.1682%. The coefficient on income is positive and significant, providing evidence that tree canopy is a normal good.

The coefficient on SITETIME, a variable that measures a substitute for tree canopy within 1/4 mile of a property, is negative and significant. Increasing the amount of tree canopy within 1/4 mile of a property by 1% is estimated to decrease the amount of time spent at the five natural parks in the Portland area by 0.0937%. Age is again positive but not significant. The negative sign on education is counterintuitive and is

TABLE 9
INSTRUMENT TESTS

	Underidentification	Weak Identification	Overidentification
Linear second stage	Anderson <i>LR</i> -statistic: 53.779 $\chi^2_{12}(p\text{-value})=0.0000$	Craig-Donald Wald <i>F</i> - statistic: 4.897 $f_{0.05} = 11.51$	Sargan statistic: 8.597 $\chi^2_{11}(p\text{-value})=0.6591$
Double-log second stage	Kleibergen-Paap rk- <i>LR</i> - statistic: 26.811 $\chi^2_{12}(p\text{-value})=0.0132$	Kleibergen-Paap rk Wald <i>F</i> -statistic: 3.170 $f_{0.05} = 11.51$	Hansen <i>J</i> -statistic: 15.235 $\chi^2_{12}(p\text{-value})=0.2288$

possibly the result of the double-log model's inability to represent the nonlinear relationship between the demand for tree canopy and education observed in the linear model.

Endogeneity

To examine the effectiveness of the 2SLS results we conducted tests for underidentification, weak identification, and overidentification of the instruments. As shown in Table 9, Anderson's likelihood ratio test (Kleibergen-Paap rk-*LR*-statistic) indicates the model is identified for both specifications; however, the Craig-Donald statistic (Kleibergen-Paap rk Wald *F*-statistic) suggests that both specifications of the model are only weakly identified. Sargan's statistic (Hansen's *J*-statistic) indicates that the instruments are valid, that is, not correlated with the error term and also correctly excluded from the estimated equation.

Per-Property Benefit Estimates

Per-property benefit estimates for a range of tree canopy levels are calculated using the second-stage results (Table 10). The estimated demand curve is integrated from zero canopy coverage to different tree canopy levels for each observation; the observation-level benefits are then averaged over the entire sample. Figure 2 is a graphical representation of the estimated demand curves.

The tree canopy levels evaluated include (1) the lowest average tree canopy coverage (2.53%), (2) the mean coverage (7.21%) for the study area, (3) a coverage level (15%) reflecting roughly a doubling of the average tree canopy within the study area, and (4) the level of tree canopy where we see a

decline in benefit estimates in the quadratic model (40%). The average benefit estimates for the mean canopy cover (7.21%) within 1/4 mile of properties in the study area represent between 0.75% and 2.52% of the mean sale price of \$175,160 under the two different specifications. A test of significance of the population mean benefits is performed for each estimated benefit reported in Table 10. The *t*-ratios for these tests against the alternative that the population mean benefit is different from zero are all greater than 100, signifying that the benefits are significantly different from zero. A 95% confidence interval for the population mean benefit is reported for each benefit estimate in Table 10.

The results also allow us to compute the change in the per-property benefits from a change in the level of tree canopy coverage. For example, for each observation in our data set we compute the difference between the per-property benefits obtained by integrating the second-stage benefit function from 0% to 7.21% and the per-property benefits obtained by integrating the second-

TABLE 10
PER PROPERTY BENEFIT ESTIMATES FOR
ALTERNATIVE CANOPY COVER AND 95%
CONFIDENCE INTERVALS

Percentage of Tree Canopy	Quadratic First Stage, Linear Second Stage	Quadratic First Stage, Log Second Stage
2.53	\$1,671 ± \$15	\$548 ± \$2
7.21	\$4,416 ± \$42	\$1,310 ± \$5
8.21	\$4,944 ± \$47	\$1,459 ± \$5
15	\$7,988 ± \$87	\$2,409 ± \$8
25	\$10,747 ± \$144	\$3,684 ± \$14
35	\$11,453 ± \$202	\$4,874 ± \$18
40	\$11,037 ± \$231	\$5,447 ± \$20

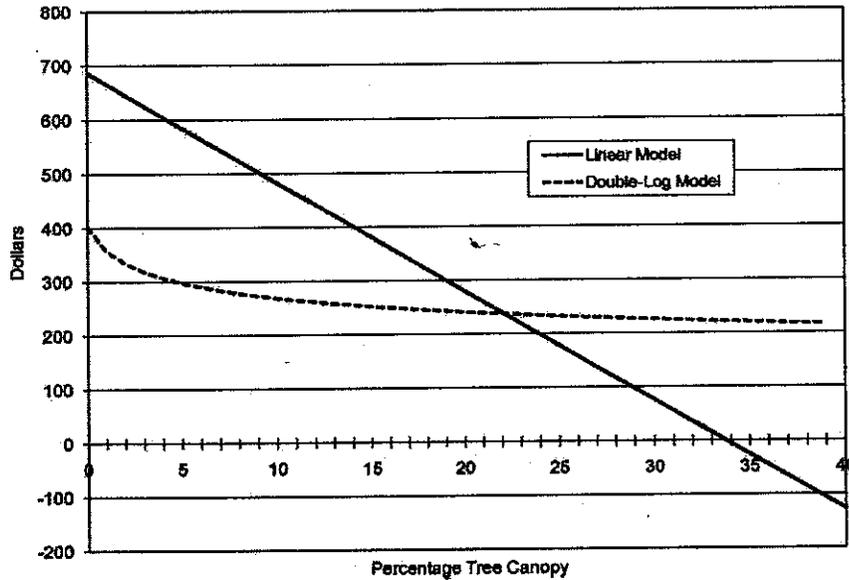


FIGURE 2
SECOND-STAGE DEMAND CURVES

stage benefit function from 0% to 2.53%. This difference, when averaged over the sample, produces a Marshallian surplus of \$2,745 for a change in tree canopy coverage from 2.53% to 7.21% (Table 11). In Table 11 we report the results of increasing tree canopy from (1) 2.53% to the study average of 7.21%, (2) 7.21% to 8.21%, that is, a 1 percentage point increase in tree canopy cover, and (3) a doubling of tree canopy coverage from 7.21% to 15%.

An increase in tree canopy cover from 7.21% to 8.21% is estimated to increase per-property benefits from \$149 to \$528. This 1 percentage point change represents an additional 1.35 acres of tree canopy within $\frac{1}{4}$ mile of a property, which corresponds to a per-acre benefit ranging from \$111 to \$391. The null hypothesis that the mean per-property benefit associated with the change from one level to another is zero is rejected with *t*-ratios all greater than 100. This suggests that the per-property benefit associated with each of the estimates in Table 11 is statistically different from zero.

The linear second-stage specification produces substantially higher benefit estimates than the logarithmic second-stage

specification. One plausible explanation is that the perceived benefits of tree canopy decrease with increases in the quantity of tree canopy, but at an increasing rate. A linear demand function would not capture this nonlinearity and would produce benefit estimates that are too large. Thus, one should be careful in deciding which set of estimates to use for policy analysis.

VI. CONCLUSIONS

Portland, Oregon, is described as a "particularly green and well-treed city"

TABLE 11
PER-PROPERTY AND PER-ACRE BENEFIT ESTIMATES
FROM PERCENTAGE CHANGES IN CANOPY COVERAGE
AND 95% CONFIDENCE INTERVALS

Change in Percentage of Tree Canopy	Quadratic First Stage, Linear Second Stage	Quadratic First Stage, Log Second Stage
2.53 to 7.21	\$2,745 ± \$27	\$762 ± \$3
7.21 to 8.21	\$528 ± \$6	\$149 ± \$1
7.21 to 15	\$3,572 ± \$45	\$1,099 ± \$4
Per acre benefit from 7.21 to 8.21 increase	\$391	\$111

(Poracsky and Lackner 2004, 1). The mean percentage of tree canopy within $\frac{1}{4}$ mile of properties in the data set is 7.21% with 5.55% on privately owned land and 1.66% on publicly owned land. This average, however, masks large differences in the distribution of tree canopy across the study area.

The estimated coefficients from the first-stage hedonic price model indicate that an increase in tree canopy in parts of the study area with small amounts of tree canopy (N, NE, SE Portland) is expected to increase the sale price of properties. However, in the heavily treed areas of SW and NW Portland, increases in tree canopy are estimated to decrease sale prices. This effect is attributed to the already large percentage of tree canopy in these areas and the potential that highly desirable views will be blocked.

The coefficients on the percentage of tree canopy within $\frac{1}{4}$ mile of a property are consistently negative and statistically significant across specifications for the second-stage model; the signs on other explanatory variables are consistent with a priori expectations. Per-property benefit estimates for the mean canopy cover within $\frac{1}{4}$ mile of properties in the study area range from 0.75% to 2.52% of the mean sale price of \$175,160.

The hedonic price method is only able to capture benefits that are capitalized into the sale price of properties. The attribute that was the focus of this study—tree canopy that provides between 76% and 100% coverage and encompasses at least one continuous acre—generates many public benefits such as wildlife habitat, improved air quality, reduced runoff and flooding, lower noise levels, and climate moderation. Future research can use the results of this study to analyze the benefits and costs of Portland's urban forest (McPherson et al. 2002).

The small average lot size for residential properties in the study area points to the need for a coordinated effort to maintain and enhance tree canopy. Current regulations in the study area prohibit cutting healthy trees on large lots if doing so would

create a "significant negative impact" on the "erosion, soil stability, soil structure, flow of surface waters, water quality, health of adjacent trees and understory plants, or existing windbreaks" and "the character, aesthetics, property values, or property uses of a neighborhood" (City of Portland, Oregon 2005). Our empirical results suggest that these regulations, tree planting programs sponsored by nonprofit associations, and efforts by the regional government to educate property owners about the benefits of wildlife habitat in their neighborhood will maintain, or perhaps enhance, the sale price of single-family residential properties in Portland, Oregon.

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Comments and Concerns Regarding Tree Project – 6/8/10

John Gibbon – 9822 SW Quail Post road

The recent Tribune article regarding this process showed a picture of several trees in newer subdivision project at SW 58th and Capitol Highway in Far Southwest Portland. That stretch of Capitol Highway was where, if time had allowed, I had hoped to take the Planning Commission on it's Southwest tour a few years ago, as it is a stretch of road that in a short distance illustrates a number of the tree issues that the city faces in the West Hills, I was present when the picture was taken since I used the area to illustrate that point to a reporter from Tribune family of paper. Unfortunately what the published pictures lacks is the detail to show that of the three major Doug firs included in the picture, clearly intended to be preserved in this common wall and single family project's common area, one is dead and one is most likely dying.

The issues beyond that illustrated by the picture on this stretch of Capitol Highway include - 1) the removal of a significant (30 inch ?) Doug fir from the parent parcel of a property after it was land divided into three parcels and developed with houses, mostly it appears because the new owners of the original home needed additional front yard parking space for their 3 vehicles and a trailered boat; 2) The removal of an estimated 90% to 95% of the tree cover from a property that Jeff Fishe has developed into a fine townhome project (I'm actually glad the Planning Commission didn't see that site on the tour, Jeff was in the clearing and grubbing stage then and I doubt that his ability to make needed creditable contributions to this process would have survived that particularly ugly stage of the development process) and 3) the successful retention of a number of trees clusters on a single family site redeveloped into a senior assisted living project at the corner of Capitol Highway and Lesser Road.

This situation illustrates by the photo demonstrates two problems that need that the Planning Commission needs to consider in the work being done today.

First the problem of how failed tree plans are to be handled. In Southwest Portland this is a consistent problem that I hope the tree project will, by rationalizing the permit process will improve. Right now in many of the land divisions subject to tree preservation requirements preserved large trees simply do not survive more than a few years leaving new home owners or groups of new home owners responsible for the trees with a removal problem. The question that arises from this scenario is whether the sunset provisions, that I strongly support, will cause dead and dying trees to be retained too long especially in the group owned common area. I would urge you to make clear that in such situations, where the best laid development plans fail in the course of events, that individual lot owners or small groups of homeowners be given incentives to quickly replace the removed trees under the 1 for 1 replacement standards applicable generally to dead and dying trees rather than on the basis of attempting to replay the conditions of the development plan. Even in cases of owners wanting to remove healthy preserved trees that they judge just don't work with a developed site I personally support implementing some form of replacement ratio approach rather complicated and expensive preservation plan reviews, I believe it has better chance of getting the City trees and compliant property owners.

T.71

Second I would point out to the Commission that this photo absolutely illustrates the importance of developing some sort of system that supports the stewardship of trees on commonly owned areas through a special type of programmatic permits or some method tailored to these areas. Because the City doesn't and probably now can't legally regulate the exact form the common ownership takes this will be a challenging task but it is one that must be undertaken. This because any astute observer must clearly recognize that the use of common areas permitting clustering offers the best opportunity to protect trees as well as other environmental features in many private ownership situations. I believe that in many ways they are very much like and on the same scale as many institutional operations such as churches or the assisted living facility I referenced earlier and that the community would benefit from approach that supports these types of uses and ownerships making good tree decisions.

**Written Testimony Submitted for PC / UFC hearing on
Citywide Tree Project**

Submitted after 6/08/10

	Name	Organization	Date
72	Jim Wilson		6/11/10

Beckman, Stephanie

From: Hamilton, Joan on behalf of Planning Commission
Sent: Friday, June 11, 2010 1:10 PM
To: Jortner, Roberta (Planning); Tracy, Morgan (Planning); Beckman, Stephanie; Kroma, Anne (Parks)
Subject: FW: Proposed Title 11

All,

Here's a letter of testimony for UFC and "received after record closed" for Planning Commission. I will forward any testimony that dribbles in to the PC for their information at some point, but will stamp it "received after record closed."

Joan Hamilton

Planning Commission / PTE Contracts Coordinator

Bureau of Planning and Sustainability

1900 SW 4th Avenue, Room 7100

Portland OR 97201

Interoffice: B299/7100

Telephone: 503-823-5772

email: joan.hamilton@portlandoregon.gov

Please note the City's new web domain www.portlandoregon.gov and my new email address

joan.hamilton@portlandoregon.gov

From: Jim Wilson [mailto:jwilson@srgpartnership.com]

Sent: Friday, June 11, 2010 8:40 AM

To: Planning Commission

Subject: Proposed Title 11

The idea that I would have to get a permit to trim trees in the sidewalk strip of my property is repugnant. There are no trees in the strip at present and it has been my desire to plant some trees here. I like the general objectives of the initiative, particularly increasing the canopy cover, but no way am I going to plant trees where I will be subject to City oversight of when and how I prune them and the attendant fees and inspections. The proposed regulations take the model of building and zoning codes into an area where there is no compelling public good to secure – worthy objectives yes but threat to life safety, not really.

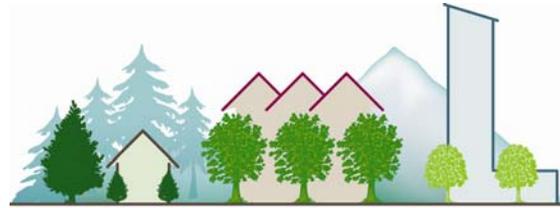
The concepts and development of this Code is obviously the product of a bureaucracy not the citizenry. It appears very likely to be costly, burdensome and ineffective at securing some the primary objectives, particularly increasing the canopy on private land (including sidewalk strips). I urge the adoption of a far lighter hand, more like the friends of trees program and less like the Portland tree police less you compel us away from an arboreous prospect.

Thank you,
 Jim Wilson
 SE Portland

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Appendix C

**Public Comments and Staff Response Report
(June 21, 2010)**



Citywide Tree Project
Policy Review & Regulatory Improvement

PUBLIC AND AGENCY COMMENT AND STAFF RESPONSE TABLE

JUNE 21, 2010

**REFLECTING TESTIMONY TO THE
PORTLAND PLANNING COMMISSION AND URBAN FORESTRY COMMISSION
PUBLIC HEARING AND WORK SESSIONS
MARCH 23 THROUGH JUNE 8, 2010**

INTRODUCTION

The following table summarizes comments submitted to the Planning Commission and Urban Forestry Commission during the public hearing and work sessions related to the Citywide Tree Project Review and Regulatory Improvement Project – Proposed Draft (February 2010).

The table presents excerpts from written testimony, including letters and emails. The table also includes a summary of verbal comments as summarized from the Planning/Urban Forestry Commission meeting minutes for individuals who did not submit written comments. This testimony was received over the course of six separate meetings held on March 23, April 13, April 27, May 11 and June 8. The Planning Commission closed the public hearing record on June 8. This document will be updated to include additional testimony received by the Urban Forestry Commission as the public record becomes available.

The table is organized by general categories relating to the Discussion Guides used by the commissions during their work sessions. Copies of the Discussion Guides are available on the project website. Under each of the general categories, comments are grouped by similar topics (e.g. “emphasis on native trees”). This is intended to assist the reader in understanding the array of views on the various topics, including areas of general agreement or disagreement on a given topic.

The excerpted comments from the written testimony are presented verbatim. To organize the comments by category, the testimony from an individual may be split by topic and placed in multiple areas of the table. Portions of the testimony and supporting documents or articles are not included in the table. This approach was taken to keep the length of the table more manageable, and recognizes that some portions of the testimony were non-substantive, provided for information only, or otherwise do not

call for a response. Copies of the complete written testimony and meeting minutes from the commission meetings are available on the project website.

Staff has prepared responses to the comments presented in the table. The responses are intended to address questions and concerns, explaining or clarifying how the proposed draft addresses particular concerns expressed, or describing why the proposal does not address particular concerns. The staff responses also discuss modifications to the proposal that will likely be reflected in the next draft, based on the input and direction received from the commissions to date. The revised draft will be released for public review prior to consideration at a hearing before the City Council.



PROJECT COMMENTS AND RESPONSES
June 21, 2010

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I. TREES IN DEVELOPMENT SITUATIONS – Meeting urban forest and development goals

I.A. Land Use Reviews (outside natural resource areas) – Tree Preservation, Mitigation, Administration, Tracking

Emphasis on native trees

“Retention of the Significant Tree List for Land use Reviews. The current land division code has a list of 18 very slow growing native trees (e.g., Pacific yew, Oregon white oak, and Pacific madrone) that need protection at small sizes. These trees are a priority for preservation. . For ease of implementation, BPS and BDS have modified the proposal to cover only 6 inch Madrone and Oregon Oak. The full list should be maintained in review situations to create an expectation of preservation of those trees when the City negotiates with developers about which trees the City wants to see retained. Retention of these 18 or more trees needs to stay a priority, and that this issue needs further work by the full staff working group to evaluate what trees are on the list and how it’s used.” --- *Dean Marriott, Director Bureau of Environmental Services (3/22/10)*

“We believe that the proposed standards for tree preservation in development situations take a step backwards from the current standards by eliminating the existing "significant tree list" and replacing it with a new "priority tree list" which only includes trees greater than 20" except Oaks and Madrones which are regulated at greater than 6". We would suggest that the Commissions consider defining "priority trees" as any tree greater than 12" and expanding the 6" inch threshold beyond Oaks and Madrone to include several other native species that are either slower growing or which never reach large size. This list would include Bitter Cherry, Black Hawthorn, Cascara, Grand Fir, Pacific Yew, Oregon Ash, Ponderosa Pine, Scouler Willow, Western Flowering Dogwood, Western Hemlock and Western Red Cedar.” --- *Bob Sallinger, Conservation Director Audubon Society of Portland; Jim Labbe, Urban Conservationist, Audubon Society of Portland; Mike Houck, Executive Director, Urban Greenspaces Institute; Ron Carley, Co-director, Coalition for a Livable Future; Jill Fuglister, Co-director, Coalition for a Livable Future (3/23/10)*

“**Limited priority tree list** - The currently proposed priority tree list used to determine which trees due to their slow growing nature should be protected down to 6 inches in diameter only contains oaks and madrones. A broader list is needed to reflect the diversity of smaller, native trees.” *BES Tree Code Option, Bureau of Environmental Services (4/27/10)*

Response: *The proposal replaces the current list of 18 native tree species of various sizes (ranging from 2 to 18 inches) with qualitative criteria that require consideration of native trees generally in the land division process. These criteria provide a stronger tool to require attention to whichever native trees are on the site than the current “caliper-inch” quantity-based preservation standards which generally do not result in any special attention to native trees.*

Project staff believe it would be challenging for applicants and the City to apply the existing Significant Tree list in the context of thousands of development permits, and the introduction of qualitative criteria in these situations is not feasible. Instead, staff are evaluating options to encourage retention of smaller sized native trees through additional preservation incentives rather than mandates which could add complexity and cost to the reviews. Additionally, the Portland Plant List could be amended with accompanying educational information about the specific native trees species, their growth habits, and why they are important at smaller diameter sizes.

<p>We strongly support components of the new policy, including... Stronger tree preservation requirements in land use reviews." <i>Nancy Seton, SWHRL Neighborhood Assn. Land Use Chair, Board Member (3/23/10)</i></p>
<p>"As stewards and advocates of watershed health and restoration, the West Multnomah Soil & Water Conservation District (WMSWCD) spends significant staff and volunteer time, as well as financial resources on projects designed to protect existing tree canopy and plant native trees. We are encouraged by the proposed Citywide Tree Project objectives and new regulatory framework and offer the following comments... We believe the emphasis during the development process on preserving high-quality, large, and healthy trees over simply the number of trees... will help ensure that we protect the urban forest canopy... On behalf of the Board, I thank you for your hard work on developing the proposal." <i>Brian Lightcap, Chair West Multnomah Soil and Water Conservation District (3/18/10)</i></p>
<p>Response: <i>Support for stronger tree preservation requirements in land use review and other development situations is duly noted.</i></p>
<p>Follow through on Tree Preservation plans</p>
<p>"I have included a small example of our current "system" described in code as tree protection. A Tree Preservation Plan was a condition required by the decision permitting a land division. The new owners of the houses that were built cut down those remaining "protected" trees and are currently being cited for a violation. They state they knew nothing of the Tree preservation Plan nor that the trees were to be protected... the solutions provided by various involved bureaus are where the real problem discloses itself. Our East Portland Neighborhood Coalition Land Use Committee responded to the violation notice suggesting a less expensive way for assisting the home owners to return tree canopy to the neighborhood area in which it was lost [use of non-profit to plant trees in same watershed]. Here is part of the staff comment to that suggestion: "...I would recommend contacting the Park Bureau about using the new tree fund money they receive from this violation to use for new trees for Parks in the area the violation occurred." Note: There are no parks in the area, the Parks Bureau is not required to plant trees in areas in which they are lost, and Tree Fund decisions are made internally by the bureau." <i>Bonny McKnight (4/12/10)</i></p>
<p>Response: <i>The proposal addresses the issues raised in the following ways: 1) Tree preservation requirements would be required to be recorded on the deed of newly created lots, which would help ensure that new owners are notified about the requirements that apply; 2) The proposal would add flexibility in methods of mitigation for tree violations. Adding payment to a non-profit organization that plants trees as a possible mitigation method has been noted for possible inclusion in the next code draft (see 5/20/10 tracking table, Section 33.853); 3) The proposed uniform permit system would reduce the risk of inadvertent violations since all property owners would be subject to calling for verification of any exemptions prior to removing trees greater than 12" diameter on private property. This process would include a check to confirm the trees are not supposed to be protected per development-related requirements or conditions of approval.</i></p>
<p>"First the problem of how failed tree plans are to be handled. In Southwest Portland this is a consistent problem that I hope the tree project will, by rationalizing the permit process will improve. Right now in many of the land divisions subject to tree preservation requirements preserved large trees simply do not survive more than a few years leaving new home owners or groups of new home owners responsible for the trees with a removal problem. The question that arises from this scenario is whether the sunset provisions, that I strongly support, will cause dead and dying trees to be retained too long especially in the group owned common area. I would urge you to make clear that in such situations... that individual lot owners or small groups of homeowners be given incentives to quickly replace the removed trees under the 1 for 1 replacement standards... rather than ... attempting to replay the conditions of the development plan. Even in cases of owners wanting to remove healthy preserved trees that they judge just don't work with a developed site I personally support implementing some form of replacement ratio approach rather [than] complicated and expensive preservation plan reviews, I believe it has better chance of getting the City trees and compliant property owners." <i>John Gibbon (6/8/10)</i></p>

<p>Response: <i>The proposal includes provisions that allow for removal of dead, diseased and dangerous trees that are subject to approved tree preservation plans without a land use review, provided the condition of the tree is not the result of a violation. Where there is no documented violation of tree protection requirements, such a tree could be removed and replaced under a Title 11 permit. The proposal would continue to require a land use review to amend approved tree preservation plans for other reasons, so there would be opportunity for public review and comment if changes are requested. The intent of the proposed sunset is to place a limit on the timeframe for which this process would be necessary, after which property owners would be subject to the City's general tree permit requirements.</i></p>
<p>Concerns of Tree Preservation criteria in other Land Use Reviews</p> <p>"In past discussions on the Citywide Tree Project, we had indicated we were strongly opposed to adding tree related approval criteria to Adjustment Reviews, Design Reviews, and Conditional Use Reviews, but were in agreement with adding tree-related approval criteria to Conditional Use Master Plans, due to their typically large site size. We are still strongly opposed to adding approval criteria to Adjustment Reviews. However, we have found a solution with BPS that is workable for Design Reviews and Conditional Use Reviews, where it is not a separate criterion, but trees are taken on balance with other factors being considered in the review. This gives us the tools we need for the appropriate situations to save trees without adding more time and cost to every one of these reviews. Regarding Conditional Use Master Plans, although previously we were in agreement with adding tree-related approval criteria, due to the most recent phase of more layoffs, we are now changing our position on adding tree-related approval criteria and strongly recommend just using the same solution that was developed for Conditional Uses. Furthermore, it is not our experience that Conditional Use Master Plans are the source of unnecessary tree loss. These sites are large, and people have options in the layout of the master plan, and generally are not choosing to unnecessarily remove trees. Adding new criteria is a solution in search of a problem, and adds more unnecessary time and cost to the administration of these reviews for no clear benefit." <i>Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (5/11/10)</i></p> <p>Response: <i>Code revisions have been identified to address the issues noted above. Specifically, staff intends, with the Planning Commission and Urban Forestry Commission's endorsement, to drop the specific tree preservation approval criteria proposed for Adjustments, Design Reviews and Conditional Use Reviews from the proposal. However, the next draft will add Tree Preservation to the list of consideration factors for Design Reviews, and to certain Conditional Use approval criteria. Conditional Use Master Plans will be addressed in the same manner as other conditional uses.</i></p>
<p>Specific Code Language Comments</p> <p>Proposed Code: Chapter 33.630 Trees</p> <p>Comment: As a general comment, it appears this chapter is written for residential-type land divisions, but clearly applies to C, E, and I zones which is a concern. There does not appear to be any flexibility for undeveloped sites in C, E, and I zones. For example, Section 33.630.300 (Modifications that Will Better Meet Tree Preservation Requirements) provides modifications to site-related development standards as part of the land division review. However, the only standard listed applies to allowing reduction in minimum density, which does not apply to C, E, and I zone development. We recommend this section be modified to more closely address the conditions that exist with employment and industrial zones specifically, or allow more flexible options for compliance with tree requirements during a land division. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p> <p>Response: <i>This chapter currently applies to all zones, including C, E and I zones, and is proposed to continue to apply to all zones. The modifications allowed to better meet tree preservation (33.630.300) include two categories: A. Site-related development standards and B. Minimum Density. While the allowed reduction in minimum density is only applicable to residential uses, any site is eligible to propose modifications to other site-related development standards (setbacks, height, etc) in order to preserve trees. The proposed approval criteria (33.630.200.D) are also intended to provide additional flexibility for all sites by considering the expected uses and intensity of development when evaluating tree preservation. Staff is open to additional suggestions to provide flexible standards that will encourage tree preservation in non-residential land divisions.</i></p>

<p>Proposed Code: 33.630.200 Tree Preservation Requirements for Trees Located on the Site (TREES): “2. Proposals to divide sites in C, E, or I zones where all of the proposed lots are currently developed with commercial, employment or industrial development have the option to defer tree preservation review to the time of any subsequent redevelopment of the site. If this option is used, the preliminary plan approval must be subject to a condition of approval that subsequent development permits are subject to the tree preservation standards of Title 11, Chapter 11.600; and”</p> <p>Comment: We support this requirement, but we are not clear why there is an option to defer the tree preservation plan for undeveloped sites. Frequently, sites move through the land division process and the actual development (which would establish the trees that can be preserved and those that must be removed). Also, for existing developed lots, the proposed code indicates, “...where all of the proposed lots.” It is not clear what the outcome would be if all but one lot in a subdivision is developed, and it is unclear if this means the deferral option is not available. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
<p>Response: The intent of this exception is to allow commercial, industrial and employment sites that are fully developed to go through a land division without addressing tree preservation requirements. In situations where no additional development is anticipated, the requirement to survey and inventory trees and develop a preservation plan adds limited value to the review and can represent a significant cost to the applicant. This exemption is not proposed for sites that are partially developed so that tree preservation would be evaluated along with the lot configuration, provision of services, and other factors considered in the review of additional future development on those sites. The deferral option would <u>not</u> be available for sites where all of the proposed lots, except one, are developed. Staff will seek to make this more clear in the next code draft.</p>
<p>Proposed Code: Chapter 33.730 (F-1) Quasi-Judicial Procedures: “33.730.050 Pre-Application Conference 1. Preliminary tree assessment. A preliminary tree assessment involves a site visit by City staff to evaluate trees on the site and help set priorities for tree preservation. A preliminary tree assessment is required for Type III land division and planned development applications that have trees present on the site. The Director of BDS may require a preliminary tree assessment on a case-by-case basis for other review types if relevant to the approval criteria for the review. Preliminary tree assessments should generally occur in conjunction with the pre-application conference. Required assessments must occur prior to submittal of the land use application. A separate fee may be charged.” Comment: This step appears to be an unnecessary and costly requirement for a Type III land division. First, it is not clear from this requirement which staff will be involved, and if City staff have the qualifications to assess tree conditions and priorities, particularly if a separate fee is charged. We feel trees should not be treated any differently than other elements of development (traffic, wetlands, etc.), whereby an applicant’s consultant can provide a tree assessment for review by City staff. Further, it is often premature to require this at the time of the pre-application conference, since the purpose of the conference is to review preliminary ideas and strategies prior to specific studies by consultants. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p> <p>Response: This requirement will be removed from the code in the next code draft. Staff will look for other means to provide early input from City tree professional on a case by case basis.</p>
<p>I.B. Building Permits – Tree Preservation, Mitigation</p>
<p>Incentives vs. Regulations</p>
<p><u>Reliance on incentives or regulations, or some blending of the two.</u> Is it possible to rely on incentives more than regulations to achieve the goal of increased canopy? In situations where a developer might be able to preserve a tree, but would be inclined to cut it down, what are effective incentives that the City could offer to preserve the tree? The proposal offers some flexible development standards to facilitate tree preservation, and this is good. What else could be offered to incent or remove obstacles to tree preservation?--- <i>Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (3/22/10)</i></p>
<p>Response: We appreciate the support for the proposed flexible development standards and also agree that incentives are important tools to help preserve tree canopy. Staff is exploring additional incentives to help encourage tree retention, however regulations are also important to provide baseline safeguards to help preserve and protect and replenish Portland’s urban forest.</p>

<p>Proposed Code: 33.140.240 (B-1-A-1) Pedestrian Standards: “Where a Priority Tree proposed for preservation, or its root protection zone, is within the straight line path, the path may meander to avoid the tree or root protection zone and may be up to 150percent of the straight line distance.”</p> <p>Comment: Although the application of pedestrian standards is limited within Port property, we feel an increase of only 30% to meander around a tree/root zone is not adequate. We recommend at least 50% (i.e., total 200%) to allow adequate flexibility to accommodate trees. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
<p>Response: <i>This change will be included in the next code draft.</i></p>
<p>Proposed Code: 33.266.110 (B-4) Minimum Required Parking Spaces: “Exceptions for sites where Priority Trees are preserved. Minimum parking may be reduced by one parking space for each Priority Tree preserved and protected in accordance with the requirements of Title 11, Section 11.600.080. A maximum of 2 parking spaces or 10 percent of the total required may be reduced, whichever is greater. However, required parking may not be reduced below 4 parking spaces under this provision.”</p> <p>Comment: Although we appreciate the ability to reduce minimum code-required parking, it is more common that the amount of parking in commercial/industrial development is based on market need or user requirements that exceed minimum requirements. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
<p>Response: <i>Staff understands that the allowance to reduce parking spaces may get limited use given existing market-driven pressures for parking. It is proposed as one of several flexible standards intended to give applicants options that make it easier to preserve trees. If the market begins to recognize the value of existing trees more explicitly this pressure could shift in the other direction.</i></p>
<p>Where to Focus Increasing Tree Canopy - Private and/or Publicly Owned Land</p>
<p><u>Where to get the increased canopy...the right-of-way or private property?</u> We have 26% tree canopy in Portland which is very good. It is consistent with the national average. As a comparison, Seattle has an 18% tree canopy. Our goal of 33% is in reach. Is it possible to achieve the goal of increased tree canopy by focusing our efforts first on getting more street trees or trees on City-owned land, and secondly on regulating trees on private property? Is it possible to achieve the goal of 33% tree canopy by solely focusing on street trees, and keeping the tree regulations on private property to a very simple minimum? --- <i>Rebecca Esau, Manager, Land Use Services Division, Bureau of Development Services (3/22/10)</i></p>
<p>“A Parks Bureau document titled "Urban Forest Canopy: Assessment and Public Tree Evaluation" from October 2007 states that:</p> <ul style="list-style-type: none"> • Just under ½ of the City's tree canopy is on publicly owned land; • An inventory was included of the 1.2 million street and park trees. Of these trees, 17% had a "dbh" (diameter at breast height) of 18 inches or greater; • A little less than ½ of all street tree planting opportunities have been planted. <p>What these figures show is:</p> <ul style="list-style-type: none"> • Nearly half of the City's tree canopy can be protected just by managing or regulating trees on publicly owned property... • The fact that less than half of the street planting opportunities throughout the city have been planted provides significant opportunities for increased tree canopy before we even start talking about tree requirements for private properties. <u>It would be worthwhile to direct funding to developing this part of the City's green infrastructure, and getting more street trees planted, given the extensive opportunities there.</u> • Not only is a significant amount of the City's tree canopy on publicly owned property, but nearly 20% of that canopy consists of "priority" trees (trees 18 inches and greater). Having the ability to regulate and preserve this amount of mature canopy on publicly owned land, in combination with the sizable percentage of private residential properties (16-24% from our sample) that are already preserving trees should point to less of a need for a hard, regulatory approach to preserving trees on private property, and allow for more of an incentive approach to preservation, possibly through BES credits related to the stormwater benefits they provide.” <p><i>Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (5/11/10)</i></p>

Response: *It is appropriate to focus part of the City's tree preservation and planting efforts on City property, as street tree and city trees comprise nearly half (47%) of the current canopy in Portland. However, it would be difficult and undesirable from a neighborhood livability and equity perspective to concentrate the urban forest preservation and enhancement efforts solely on City property. There are 3,175 miles of streets. If medium canopy sized trees were planted every 25 feet on both sides (unlikely considering the lack of planter strips, presence of power lines and other utilities, plus conflicts with driveways etc.), these trees would provide canopy over roughly 19% of the city. If the City's 10,000 acres of parks and natural areas were 100% canopy [Forest Park is @79% for comparison], this, along with the full street tree canopy, would provide 29% citywide. This approach would also be unlikely given that these areas include developed active parks and sports fields, open meadow areas, etc. Adding 8,000 acres of environmental zone at 100% canopy would provide a total of 38% canopy. Many of Portland's neighborhoods do not have parks or environmental zones and need extensive additional tree canopy in order to meet the Urban Forestry Management Plan Goals for equitable distribution of tree-related benefits. Therefore, it seems both necessary and equitable to focus a part of the City's tree preservation and planting attention on private property in Portland.*

Development vs. Non-development considerations

Should trees on lots that are already developed be regulated in the same way, and to the same extent, as trees on sites that are being developed?
 For example, should a vacant single-family residential lot be given some allowance to remove trees at the time of development because the City expects and wants a house to be developed there? Or should they have to mitigate for all of the trees that they remove, even though it would be impossible to develop the lot with all of the trees preserved? If you opt for treating development situations and non-development situations the same and requiring replacement of trees even if they are in a reasonable building footprint, does it: a) unduly penalize property owners who have a lot of trees on their vacant lot; and b) become like a tree tax, since there is usually no feasible way to plant that many mitigation trees on a lot that is being developed, so the property owner would end up paying into the Tree Fund, in lieu of planting. We are struggling with what is fair and equitable.”
Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (3/22/10)

“Fairness and equitability – Tree removal mitigation standards should be equivalent for both development and non-development situations e.g. a level playing field.” *David McAllister, City Forester and City Nature Manager, Portland Parks and Recreation (3/23/10)*

Response: *The project proposal is designed to balance and integrate the City's urban forest management and development goals. The proposed regulations that would apply to trees in development situations intentionally provide an allowance for some tree removal without requiring mitigation for every tree removed. This allowance is meant to recognize that new development does have a footprint, and that the regulations should not create a penalty for properties with trees or create standards that could never be met. That said, the proposal does call for and provides incentives to preserve a percentage of the larger trees on the site if practical. If it is not practical to preserve on the development site, the proposal requires mitigation for these trees through payment of an in lieu fee into the Tree Fund. In non development situations, the site is usually already developed to some extent. The remaining trees are not being displaced by structures, but may need to be removed for other reasons such as for reasons of health or safety, access to sunlight, or personal preference. The proposal acknowledges this through a straightforward tree replacement requirement for most removal requests when development is not occurring.*

<p>Preservation vs. Planting</p>
<p><u>“Does the City want an urban forest that is constantly being regenerated through re-planting with trees of all sizes valued, or should greater value be placed on the preservation of large trees?”</u> The project goal is to increase tree canopy and to promote a healthy urban forest. Greater canopy can be achieved by planting more trees, or it can be achieved by preserving more of the large trees on sites where it is practical to do so, or some combination of these approaches. What is the simplest way to achieve greater canopy, while accommodating the development and infill envisioned for the City, as well as the other sustainable things people want to do with their property, such as growing their own fruits and vegetables, installing solar panels and maximizing use of natural light, building attached and detached accessory dwelling units, etc.?” <i>Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (3/22/10)</i></p>
<p>“Tree Preservation and mitigation - Both tree mitigation and tree preservation are necessary. Tree preservation maintains the current trees and benefits while mitigation provides future trees and future benefits. Each of these regulatory approaches should be designed to achieve its outcome rather than trading one for the other.” <i>David McAllister, City Forester and City Nature Manager, Portland Parks and Recreation (3/23/10)</i></p>
<p>“...Would we like even stronger regulations to protect many of our existing, mature native trees within the City of Portland? Yes... But, it is our view that the current package before you has been carefully crafted to meet the performance standards and goals of the City of Portland, building in flexibility and performance standards to meet the diverse parts of the City and the specifics of its unique places.” <i>Jim Thayer, Southwest Hills Residential League, President (3/23/10)</i></p>
<p>“Dramatic increases in tree planting efforts over the past decade are undermined by lack of protection and mitigation requirements for trees on much of our landscape, confusing and sometimes contradictory regulations, lack of educational outreach resources and insufficient enforcement capabilities. As older and larger trees are being lost, we are increasingly replacing them with smaller and more columnar trees which provide far fewer ecosystem services. An Urban Forestry Assessment recently completed by Audubon, Metro and PSU shows that Portland is increasingly lagging behind many neighboring communities in its efforts to protect its urban tree canopy... we believe that in order to achieve the goals of the city we cannot just plant thousands of trees as we are currently doing, we must also have in place stronger regulations for the preservation of trees. FOT believes that if we are going to shoot for a 33% canopy cover as outlined in the urban forest implementation plan, planting trees alone will not achieve that goal. Not only should we plant trees but also we must preserve and protect, to a reasonable level, and to the best of our ability, all those big, old trees that make up a great percentage of our current cover.” <i>Scott Fogarty, Executive Director, Friends of Trees (4/13/10)</i></p>
<p>“Like Audubon, UGI and CLF, we believe that recent dramatic increases in tree planting will only be truly effective when coupled with concurrent protection and mitigation of older and larger trees across the entire landscape. This proposal will do that.” <i>Matt Clark, Executive Director, Johnson Creek Watershed Council (4/12/10)</i></p>
<p>“Our understanding is that the policies as currently proposed would require the City to spend between \$1.5-\$2.0 million annually to administer... The City could likely achieve far greater success in enhancing tree canopies in existing neighborhoods if it just took one-third of the proposed budget and put that towards the purchase of trees for neighborhoods to use as part of these efforts. This would be much simpler, require less money, and would achieve a far greater benefit than simply adding to the administration layers within City departments.” <i>David Nielsen, Chief Executive Officer, Home Builders Association of Metro Portland (4/27/10)</i></p>

<p>Response: <i>As pointed out in the comments, both tree preservation and tree planting are necessary to sustain and enhance the urban forest, and to meet goals for development and other uses of property.</i></p> <p><i>Leveraging the development process to promote tree preservation when practicable ensures an immediate and sustained benefit over playing continual “catch-up” through planting efforts alone. To the extent it is practical to replant on sites where tree loss occurs, the tree functions will be maintained and dispersed more equitably throughout the city (vs. being concentrated primarily in public areas).</i></p> <p><i>Application of the proposed tree preservation and density standards to development scenarios are conservatively estimated to generate ten times the increase in tree canopy over time, compared to applying the implementation costs to tree planting alone.</i></p> <p><i>Project staff have been working with the other City bureaus to identify cost saving strategies. At this point revisions to the initial draft proposal are estimated to reduce ongoing costs by 50%, while maintaining most of the projected tree canopy benefits.</i></p>
<p>Complexity/Clarity of the proposal</p> <p>“...complexity has made it difficult for many in the public to read and comprehend the entirety of the regulations. This leads some to rely on assumptions with regard to what this proposal does or doesn't do. For example, some people think that the proposal will ensure the preservation of large trees. While the proposal provides a preservation standard, preservation is not required, and trees may be replaced, or a payment in lieu can be made if the tree can't be saved.” <i>Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (3/22/10)</i></p> <p>“Although the preservation standards might appear to be complex, they equitably address tree protection on every developing property. By providing tree density standards for all property uses, the City is again reinforcing that every tree is part of our collective green infrastructure and that equity across properties is important.” <i>Dean Marriott, Director, Bureau of Environmental Services (3/22/10)</i></p> <p>“Although we support tree protection/preservation, we believe the proposed code language has the potential for significant impact to not only existing and future users, but also to BDS staff when they attempt to implement the proposed regulations. Since a new code title and amendments to several other titles are proposed (over 500 pages not including appendices), it is imperative that code language is closely examined by the reviewers and the users to ensure it is properly interfaced and does not result in unanticipated regulatory constraints/conflicts.” <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p> <p>Response: <i>Staff appreciates that some believe the proposed tree preservation standards are overly complex or are unclear. One objective of this project was to provide options, based on lot sizes, and escalating mitigation requirements to provide credit for partially meeting the standards. However, these components of the proposal added complexity to the code. Staff has since developed, and discussed with the Planning Commission and Urban Forestry Commission, recommendations to further simplify and clarify the proposal in the revised draft, including sections relating to proposed tree preservation standards. As noted above, the current proposal does not ensure that large trees will be preserved, but rather is intended to provide an incentive-based standard to encourage preservation where practical. The proposal is intended to apply equitably across developing properties to reinforce that trees are part of the City's infrastructure. See additional discussion about code complexity under III. Code Consolidation.</i></p>
<p>“It is unclear why emergency tree pruning is listed under exemptions in the Trees in Development Situations section...It is also unclear why protection and preservation standards apply to every permit type, regardless of whether the requested permit was for interior alterations or zoning permits, for example, that do not result in site disturbance.” <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p> <p>Response: <i>Since the development chapter also applies to public works and capital projects, there may be city or street trees that require pruning to alleviate an emergency situation. These trees normally require permits to be pruned. We will attempt to better clarify the distinction in the revised code. Clarification will also be added that the preservation standards apply only when site disturbance activities are proposed (and trees are present).</i></p>

<p>Proposed Code: Chapter 11.600.050 Tree Plan Submittal Requirements Comment: The detail required for a tree plan submittal, which is required for all development permits, seems excessive considering some permits may not include exterior work. It is likely the level of detail requested for a tree plan could not be prepared accurately unless a topographic survey is accomplished, which may not be warranted. Once again, there should be a reasonable approach to requiring tree plans and review for projects that may not include work that impacts trees. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p> <p>Response: <i>We will clarify that a tree plan is only required when the tree preservation standards are triggered (site disturbance and proposed tree removal) or when tree density requirements apply. In addition, please note that applicant's may define a "development impact area" to limit the extent of information required on a tree plan.</i></p>
<p>Extent of the Problem with the City's Existing Tree Policies and Regulatory system</p> <p>"HBA is also unsure of what the problem the City is trying to solve that requires such a major overhaul of its Tree Policy... All in all, it seems to be a reactionary effort to a problem that isn't really there that will cost the City money and hurt the development it desires to achieve." <i>David Nielsen, Chief Executive Officer, Home Builders Association of Metro Portland (3/23/10)</i></p> <p>"Tree Canopy Cycles. Some would believe that we are losing massive amounts of tree canopy. Portland over the years has seen tree canopy come and go." <i>Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</i></p> <p>"Developers rarely violate tree removal restrictions already in place." <i>Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</i></p> <p>"I have also noticed that when developers plan they often want a clean slate. Existing trees are not seen or are viewed as a nuisance to heavy equipment. They are an afterthought. I would like to see the city encourage creative development that includes preserving and integrating existing trees into new developments." <i>Robert Elan (4/12/10)</i></p> <p>"Trees are a \$5 billion dollar asset of the City and provide drainage and watershed health ecosystem services, often for a fraction of the cost of providing single objective grey infrastructure solutions....Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects, increase the energy efficiency in our buildings, reduce neighborhood crime and improve our quality of life and the livability of our city. Trees play an integral role in the success of many recently adopted city plans and programs including the Portland Watershed Management Plan, The Urban Forestry Plan, Grey to Green Initiative and the Climate Change Action Plan. Yet today protection for our urban trees is inconsistent at best." <i>Scott Fogarty, Executive Director, Friends of Trees (4/13/10)</i></p> <p>"The ecosystem value of larger mature trees is much higher than a younger and or smaller species of tree. The Bureau of Development Services' current data system has not easy way to provide information regarding tree violations, for the public to even know if there is a tree plan that exists for their property and requires certain trees to be protected. The lack of clarity in the current system makes it difficult for property owners and neighbors to know if trees are being cut legally or in violation of code. It also precludes anyone from providing a quantifiable description of violations under the current system. I have observed the impacts of tree cutting both as part of development and non-development situation on erosion of the roadway, and neighbors' properties in my own neighborhood." <i>Margot Barnett (4/1/10)</i></p> <p>"Ensuring that a strong tree canopy continues to develop over time is a different goal than simply preserving existing trees. While mature trees have value, our belief is that the policies need to provide more flexibility and focus on the long-term goal-ensuring a healthy tree canopy continues over time. Portland's overall tree canopy has not suffered under the existing tree policies. There are very few examples of violations of tree codes by the development/building community over the years. In fact, there are many examples of neighborhoods whose tree canopy was significantly improved (e.g. Eastmoreland and Laurelhurst) as a result of being developed." <i>David Nielsen, Chief Executive Officer, Home Builders Association of Metro Portland (4/27/10)</i></p>

<p>“As an arborist in Portland, I've seen many violations by home owners, developers, landscapers, and people calling themselves arborists...There are two types of violators, the ignorant, and the ones taking a calculated risk. We can educate and provide resources for the uninformed to do things properly, but the people betting they won't get caught won't follow improved codes either...It behooves us to enforce preservation now to avoid larger problems later. How? There should be a posted sign for concerned citizens to report illegal behavior near the perimeter of construction sites. That number would get you to a person at the city with the ability to address violations in a timely manner and will reduce repeat offenses.” <i>Jim Wentworth-Plato, BCMA (Board Certified Master Arborist) (3/24/10)</i></p>
<p>Response: <i>The City Council funded the Citywide Tree Project so that the City could evaluate existing policies and regulations and develop a clear, cohesive regulatory framework that protects and enhances the urban forest. The need for this evaluation and update is identified as a high priority action in the City's Urban Forest Action Plan (adopted by City Council in 2007). There has been considerable effort on the part of community stakeholders and City staff to clearly define problems with the City's regulations pertaining to trees. This information can be found in the Appendices report that accompanies Volumes 1 and 2 of the Citywide Tree Project proposed draft. The Appendices report contains the Southwest Tree Committee report of 2005 which identifies numerous deficiencies in City regulations, as well as a series of Issue Papers developed by project staff. The Issue Papers outline multiple problems with City regulations including complexities, inconsistencies, gaps and conflicts. The Issue Papers highlight the fact that trees are not generally addressed in development situations resulting in lost opportunities to encourage tree preservation where practical and to ensure that the urban forest is replenished as development takes place. The Issue Papers also highlight inequities and disparities in the City's permit system for trees in non-development situations. The Stakeholder Discussion Group spent months discussing these problems and providing feedback on potential solutions.</i></p> <p><i>Staff agrees that the urban forest is a valuable and dynamic asset, and has attempted to design the project proposal to recognize that trees come and go. In addition, the proposal does not reflect an assumption that developers often violate tree removal restrictions. Rather, the proposal, including proposed revisions discussed during Planning Commission and Urban Forestry Commission work sessions, is designed based on an assumption that most people comply with the rules, and will continue to do so if the rules are reasonable. A reasonable level of inspection and enforcement must be provided to ensure accountability for compliance.</i></p>
<p>Tree Preservation and other City Goals (Housing, Development, Energy, Climate Action Plan)</p> <p>“In what situations does it make sense to say a large tree must be preserved, and what are we willing to give up for this goal? Would we tell someone they couldn't have a vegetable garden? Would we tell someone they couldn't have an on-site parking space or garage? Would we tell them they couldn't have two residential units, but could only have one, despite what the site's residential density allowance? Would we tell someone they couldn't have the 2,000 square foot footprint of the house, but would need to re-design for a smaller footprint? Would we allow them an exception to the requirement for on-site stormwater infiltration? Is it possible to preserve large trees in a way that is also practical, given the City's residential infill goals and the fact that the majority of development sites we deal with are small, constrained lots with very little room to avoid impacts to large trees on site?” <i>Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (3/22/10)</i></p> <p>“Tree policies must address City's and Metro's plan to increase housing density.” <i>David Nielsen, Chief Executive Officer, Home Builders Association of Metro Portland (3/23/10)</i></p> <p>“Urban Growth Boundary's and Trade-Off. To preserve farm and forest lands we needed to increase densities inside the UGB. Included in this assumption is that trees will be remove to make infill housing work.” <i>Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</i></p> <p><u>The City must spend more time reviewing the impacts its proposed tree policies will have on the very development it seeks to achieve</u>...We urge the Planning Commission to not adopt the policies as proposed and at the very least require staff to conduct a much more thorough analysis of how the proposed regulations would impact the City's plans for infill and redevelopment.” <i>David Nielsen, Chief Executive Officer, Home Builders Association of Metro Portland (3/23/10)</i></p>

<p>“Loss of Housing Density. Reduction of density formulas to preserve trees will lead to some loss of housing units by the city. The loss may be fairly small and counterbalanced by increased density allowances...to reduce lot coverage and add units will be difficult if not nearly impossible. More important is the loss of housing units should the ‘fee in lieu’ be [used] to purchase conservation easements and or land to preserve trees. <u>This loss if buildable inventory needs to be factored into the Urban and Rural Reserve process so as to be able to provide the housing units of all types as committed by the City of Portland to Metro.</u>” <i>Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</i></p>
<p>“State Land Use Goals...10 (Housing) 13 (Energy Conservation), and 14 (Urbanization) override the decisions made by the Citywide Tree Project” <i>Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</i></p>
<p>“Preservation areas behind a home on a 25x100’ lot results in a preservation area of 375 s.f. while the same 15 foot preservation areas on a 50 x 50’ lot doubles the preservation area. Neighbors have asked that the development community develop wider lots so as to blend with the neighborhood. This tree policy counter acts that request by neighbors.” <i>Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</i></p>
<p>“Prioritizing Goals...If the ultimate goal is really to have affordable housing and to have housing choices, then regulations that impede the achievement of that goal need to be given a subservient role in the conditioning of permits.” <i>Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</i></p>
<p>“We have also heard suggestions that protecting trees on the urban landscape will conflict with local and regional density targets. This is simply a specious argument. While the Tree Improvement Project appropriately focuses on preservation of trees as the preferred option, it also clearly gives developers and property owners the opportunity to pay a fee in lieu to mitigate offsite for trees that cannot be preserved onsite. In addition the project calls for significant increases in outreach resources and code modifications to promote innovative site designs that accommodate both development and natural resource protection. Preserving and enhancing neighborhood tree canopy in fact promotes compact urban form by creating livable communities that enjoy access to nature and all of the ecosystem services that trees provide. The City of Portland should consider trees an essential part of the "20 minute neighborhood" that will anchor the Portland Plan that is now under development.” <i>Bob Sallinger, Conservation Director Audubon Society of Portland; Jim Labbe, Urban Conservationist, Audubon Society of Portland; Mike Houck, Executive Director, Urban Greenspaces Institute; Ron Carley, Co-director, Coalition for a Livable Future; Jill Fuglister, Co-director, Coalition for a Livable Future (3/23/10)</i></p>
<p>“The price of doing business in a community includes internalizing externalities both positive and negative and looking at the actual value of those community assets brought forth by that business. The current proposal seems to vastly undervalue the positive community externalities related to trees on private property. The price of retaining and increasing tree density standards is NOT prohibitive or unduly burdensome to infill development or low income development. I wonder what the actual %age of developable lots will even fall under these code changes and if truly there will be a burden to development. It would be nice to see some evidence that it would” <i>Scott Fogarty, Executive Director, Friends of Trees (4/13/10)</i></p>
<p>“Portland faces many challenges. I firmly supporting a compact urban form, using infill while doing our best to preserve and enhance the green infrastructure of the region both within and outside of the urban growth boundary. Shade, clean air, and greenery are elements of livability that should be distributed equitably across housing types. As we move forward with the Portland Plan we will need to find creative ways to balance the needs for density, other forms of green infrastructure (green streets, swales, etc.) and solar access with the need to support a diverse urban forest across a variety of urban land uses.” <i>Margot Barnett (4/1/10)</i></p>
<p>“Governor Tom McCall and others pushed for Senate Bill 100 and other similar bills in the 1970's to preserve farm and forest lands and to form an Urban Growth Boundary (UGB) with the intent to focus urban development into that those UGB's. Logically, if we preserve farm and forest lands but also allow logging in certain parts of those preserved lands, doesn't it logically mean that if we are forcing development into UGB's that there is the assumption in increased density that we will need to remove some trees to make that density work?...To allow tree policy to trump those decisions without taking into consideration the major decisions made on Comprehensive Planning is a mistake and undermines the intent of Comprehensive Planning. Better to take the time to work with BDS and other bureaus to see how these regulations influence residential construction and to develop tree policy as part of the Portland Plan.” <i>Jeff Fish, Fish Construction NW, Inc. (4/13/10)</i></p>

<p>“...believes it is absolutely true that, as the PMHBA has contended that the tree code as purposed will on some level be biased against the type of denser new development which apparently has the most acceptance in the market, particularly townhome style housing...However if the city is willing to accept some reduction in the of this type of housing, along with more expensive and probably smaller single family housing and an increase in new multi-story multi-family structures in residential neighborhoods where significant development occurs it can probably gain the apparent environmental well the arguable aesthetic and "livability" benefits this proposal offers. The proposal...does however offer the home building and remodeling industry the "benefit" of subjecting all its members to the same type of regulation where now it is new land dividers who are bearing the burden of the City's regulation. Supports making this change because it is not only "fair"...but beneficial to the public and the City in the sense that retention of larger trees on more sites will have on both personal and public storm water systems as well as possible energy "benefits". <i>John Gibbon (4/13/10)</i></p>
<p>“Clean air, natural light and trees/vegetation should be looked at as “materials” that one should consider and integrate into the design, approach and building of every site, no different than sustainability, water, sewer, paved areas, building codes, planning codes and structures...The proposed tree policy does not limit a developer or property’s owner right to develop; it only requires that we all must consider trees as an important and additional variable integrated into the design, instead of ignored or clear cut to accommodate a cookie-cutter/template/flat desertland approach to all sites.” <i>Simone Goldfeder, Architect LEED AP (4/4/10)</i></p>
<p>“I believe Planning Bureau staff have made a concerted effort to develop consistent standards for the preservation and planting of trees without unduly increasing the time and cost to development in the city.” <i>Linda Robinson (4/13/10)</i></p>
<p>“Another important feature of tree canopy in a pedestrian district like St. Johns is its role in offering a shaded environment to encourage walking in the summer. Attractive transportation alternatives are important in making shopping and working locally doable. In the summer, I always choose walking routes with trees. By encouraging neighbors to stay local there can be the added benefit of efficiency and savings on auto transportation infrastructure.” <i>Barbara Quinn, Chair, Friends of Cathedral Park Neighborhood Association (3/26/10)</i></p>
<p>“...designers preserved most of the existing trees (more than half of the 430 existing trees and all of the largest ones) while greatly increasing density at New Columbia...They showed that increasing density and tree preservation can go hand in hand. DESIGN MATTERS!” <i>Mary Vogel, CNU-A, PlanGreen (4/8/10)</i></p>
<p>“The stated goals of the city are to increase canopy cover from 26 to 33 percent. Another goal of the city is infill instead of sprawl. There is a lot of friction in this debate. I support both goals, but I'm witnessing a shrinking and decline of our urban forest and livability. Smaller lot sizes don't leave room for a large canopy tree and a building. In these areas, the city may want to consider additional mini-parks or groves of trees on a single sacrificial property, so the building density can be higher on surrounding properties and still allow enough space for mature trees.” <i>Jim Wentworth-Plato, BCMA (Board Certified Master Arborist) (3/24/10)</i></p>
<p>“We believe almost no consideration has been given to how these proposed policies would impact several other City and Metro regional goals, including the large amount of housing units anticipated through infill and redevelopment over the next 20-30 years in order to grow more densely. However, there are other needs and desires that should be considered and that the policies should provide flexibility to achieve. Solar energy impact, insurance requirements, and personal preferences for shade/sun on a lot are all important considerations.” <i>David Nielsen, Chief Executive Officer, Home Builders Association of Metro Portland (4/27/10)</i></p>
<p>Laurie Butler objected that proposals contradict statewide planning goals by making it harder for builders to build. She contended costs are too high to implement, timing of this project in this economy makes no sense, and proposals treat individuals’ property rights and developers’ property rights unequally. She objected to lack of sufficient time for public review of new proposals. <i>Laurie J. Butler Excerpt from (5/11/10)Joint Planning and Urban Forestry Commission Minutes</i></p>

Response: Staff agrees that the Citywide Tree Project proposal should balance goals for residential density and infill development within the city and metro region with goals for the urban forest. The draft project proposal attempts to do just that by creating flexible standards to make it easier for development to preserve trees. Standards that allow limited reductions or increases in residential density should have a negligible effect on the overall density in the city. Further, the project proposal intends to encourage tree preservation without adversely affecting housing density and affordability. The proposal provides a credit for preserving a percentage of the larger trees on site, and allowing mitigation through payment of a “per tree” in lieu fee to the City’s Tree Fund. Tree Fund monies can then be used to replant trees elsewhere in the same watershed. As such, the draft proposal reflects an understanding that it may not be feasible to preserve trees on all development sites, but it is also intended to recognize the multiple functions of trees (including air and water quality, energy management, carbon sequestration, property values) and to establish basic site development requirements for trees, similar to stormwater management requirements.

During work sessions with the Portland Planning Commission and Urban Forestry Commission, staff proposed and received commission support for revisions to the draft proposal. The revisions are intended to further simplify the proposal, while also responding to comments from the development community and other stakeholders. Revisions include exempting lots smaller than 3000 sq. ft. from the proposed tree preservation standard, exempting lots with greater than 90% proposed building coverage, reducing the tree size trigger for the preservation standard from 20” to 12” in diameter, and reducing the preservation target from 50% to 35% of the eligible trees. The commissions also endorsed, preliminarily, the use of a “spot check” approach to inspections, instead of inspecting every site. This approach will significantly reduce implementation costs.

The proposal continues to include clear and objective tree preservation and tree density standards to maintain certainty and avoid time delays in the building permit process. Additional costs to protect or plant trees, or to pay in lieu of planting, are intended to be reasonable so as not to adversely affect housing affordability. Given proposed simplification of the initial draft standards, the commissions agreed with staff’s proposal to eliminate the optional review that was included in the draft proposal.

With the design of the revised project proposal staff believes that there should not be adverse effects on City, Metro or state goals for urbanization and other land use goals.

System Development Charges and Trees

“By paying in to a Tree Preservation Fund to purchase trees for parks, environmental services, water bureau property or even off site street trees; the city has now potentially established another SDC or modified an existing SDC outside of state regulations... why shouldn’t the very SDC funds new housing pays for parks be used to help address the City’s tree canopy protection goals, rather than adding even additional costs onto housing?” Jeffrey Paul Fish, President, Fish Construction NW, Inc.” Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)

“...it would be entirely appropriate for the City to, after quantifying the benefits that trees provide, to adjust portions of the SDCs now charged to the developers and builders to reflect these benefits.” John Gibbon (4/13/10)

Response: Staff supports the use of incentives to encourage tree preservation and tree planting. If the capitalization of trees is one day realized and SDC’s are instituted for this particular asset, credits against those SDC’s for on site planting or preservation would warrant additional consideration.

System Development Charges (SDC’s) are one-time fees assessed on new development to cover a portion of the cost of providing specific types of public infrastructure required as a result of this development. Currently trees are not, except in the context of landscape elements in specific capital projects, managed as a capital asset in Portland.

The City Tree Fund can not be used for purchasing trees in capital projects (such as park development or street improvements) but would be used for planting trees elsewhere in the city in lieu of tree replacement on development and non-development sites. The fund, as proposed, could also be used to support the purchase of conservation easements or tracts to preserve trees. The trees would not necessarily be or be managed in public ownership as is the requirement for public assets funded through SDC’s.

	<p>Proposed Code: 11.100.090 Tree Planting and Preservation Fund</p> <p><i>“B. Calculating the in-lieu fee rate. The fee in lieu of planting or preservation will be calculated to fully cover the cost of planting a new tree. Such cost includes materials and labor necessary to plant and maintain the tree through a two year establishment period. This cost will be reviewed annually based on current market prices per inch for materials, labor, and maintenance, and compared to costs paid for planting trees in the previous year. The required payment will be set forth in the City’s adopted fee schedules.”</i></p> <p>Comment: Since maximum flexibility is needed for projects in industrial/employment zones, this code section is critical since it is likely that payment of an in-lieu fee will be necessary in many instances. Therefore, the amount of fee is a primary factor, and our concern is the fee will be established at a high rate to discourage using a fee in-lieu option. As an example, the rate once utilized by the City for fee in-lieu for trail construction in the Columbia South Shore project was significantly higher than the actual cost if installed by a private party. A process for establishing a fair in-lieu rate is critical to the success of this option, and the success of development in employment/industrial zones where trees are involved. Lastly, a process that establishes public oversight (e.g., by Urban Forestry Commission) for a priority/timeline for spending the funds is critical. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
	<p>Response: <i>The mitigation planting or in lieu fee requirements in the proposal are intended to be reasonable in the context of development and non-development situations.</i></p> <p><i>The Planning Commission and Urban Forestry Commission reviewed and provided initial endorsement of staff’s proposal to further simplify the mitigation requirements in the development standards, which would reduce the cost to development. The commissions also endorsed cost recovery as an appropriate basis for setting the fee in lieu of planting. As such, the calculated fee for payment in lieu of planting will usually be somewhat higher than the costs for an applicant to simply install a tree, since the fee is based on recovering the costs for the City to purchase, plant, and establish the tree. These costs include materials, labor, transportation, and more significantly maintenance for two years. Most of the maintenance costs for trees planted on applicants’ sites are borne by future tenants or owners, including the responsibilities for tree replacement if the tree dies. Staff anticipates this fee to be established initially at \$600 per tree (equivalent to the fee currently charged for a 2” tree for T1 in the zoning code). The rate will be reviewed annually, and adjusted as necessary through City Council adoption of revised fee schedules.</i></p> <p><i>We also appreciate the suggestion to establish a priority/timeline for expenditures as established through a public process. The City Forester has stressed the need to maintain flexibility for setting spending priorities, but this can be part of that overall public discussion. Staff agrees that the UFC is a good fit for such a discussion.</i></p>
	<p>Tree Preservation During Development – General Comments</p> <p><i>“The Council agrees with the Forestry Commission that emphasis during the development process on preserving high-quality, large, and healthy trees over simply the number of trees, as well as protections for trees on property lines and adjacent sites, will help ensure that we protect the urban forest canopy.” Terri Preeg Riggsby, Chair, Tryon Creek Watershed Council (3/22/10)</i></p> <p><i>“We strongly support components of the new policy, including...Flexible development standards to encourage preserving large trees and groves, new tree preservation and tree density standards applied through building permits, improved inspections and enforcement.” Nancy Seton, SWHRL Neighborhood Assn. Land Use Chair, Board Member (3/23/10)</i></p>

<p>"I am writing to urge you to move forward on this project. We lost a valued white oak tree this year on our block. The tree was estimated to be between 130-160 years of age. It sat on a property line between two residential lots. This very big tree provided beauty, wildlife habitat, lots and lots of shade, carbon off-sets and brought character to our neighborhood. When one of the lots it bordered was up for sale, twenty-five (25) neighbors signed a petition asking the owners to keep the tree. We asked for a chance to talk to the absent property owner, then the developer, to propose how the lot could be developed with the tree. No one would respond to our letters or phone calls. We lost a valued friend in that tree. I hope this new City Wide Tree Project will help us keep trees in the future. We need the shade, the wildlife habitat and the beauty and character each one brings to our neighborhoods." - <i>Ginger Edwards (3/22/10)</i></p>
<p>"I support the Revised Tree Code and Policy...Please support stronger protections for our urban tree canopy: Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects and improve our quality of life and livability of our city. It is critical that we protect our existing tree canopy as well as planting new trees. It takes years for a tree to grow and reach its full potential and newly planted trees are highly vulnerable. To be effective, any tree strategy must focus first and foremost on protecting our existing tree canopy." <i>Veronica Kelly (3/23/10)</i></p>
<p>"...FOT believes regulation and enforcement are necessary to protect the assets of the greater Portland community and that as a LAST resort, mitigation in the general proximity of tree removal is necessary. Mitigation requirements must be structured that the value of the tree removed is taken into consideration and that mitigation funds be directed to a specific, discreet fund to be used to plant trees or to help enforce regulation." <i>Scott Fogarty, Executive Director, Friends of Trees (4/13/10)</i></p>
<p>"...FOT would support regulation of trees down to 12 inches and does not support a trigger of 20" for regulation on development sites. We feel this would create an inequity in balance of new and old trees and would further encourage the cutting of trees both on private non-development lots as well as on developable lots. This is an inherent conflict that needs to be resolved." <i>Scott Fogarty, Executive Director, Friends of Trees (4/13/10)</i></p>
<p>"In looking at the proposed code for development situations, I feel that the 20-inch diameter threshold is too large. For example, very few of the many trees in the subdivision where I live (developed in the 1960's) are 20-inches in diameter. Actually, there aren't that many that are even 12-inches in diameter, which is the trigger for a tree removal permit. I recommend lowering the threshold sizes for both." <i>Linda Robinson (4/13/10)</i></p>
<p>"We believe the diameter of trees to be protected is too large. For development it is 20 inches and for private property it is 12 inches. We would like to see a substantially lower diameter of protections especially for development. A 20 inch tree is very large. We feel this diameter should be reduced to 14-16 inches at the largest. 12 inches across the board would be preferable." <i>Jean Fike, Executive Director, East Multnomah Soil and Water Conservation District (5/10/10)</i></p>
<p>"The proposal provides clear and objective standards that will allow for development that makes the best use of the building sites, encouraging preservation, but not creating excessive new costs or delays. I particularly appreciate efforts to recognize the value of healthy large trees and groves of trees...The current proposal provides a great deal of flexibility to address trees during the development process." <i>Margot Barnett (4/1/10)</i></p>
<p>"I have also noticed that when developers plan they often want a clean slate. Existing trees are not seen or are viewed as a nuisance to heavy equipment. They are an afterthought. I would like to see the city encourage creative development that includes preserving and integrating existing trees into new developments." <i>Robert Elan (4/12/10)</i></p>
<p>"...People as a whole do not like change...Constantly some in the public assumes that if there is a vacant lot in a neighborhood, maybe even the buildable side yard of a neighbor's home is always going to remain a beautiful groomed side yard or garden spot. Again, being naive of the fact the neighbor owns more than the lot his home sets on does not automatically 'grandfather' it in as the neighbor's personal park or view corridor. Trees in many...neighborhoods enhance the homes probably to greater and better extent than if there had been existing trees on the sites when the homes were originally built." <i>Jeff Fish, Fish Construction NW, Inc. (4/13/10)</i></p>

<p>“As a residential developer, there are many considerations in building a home on a property, not the least of them are trees...trees do have an economic value on a properties value. But it is not the only value that has to come into a decision. First, the average full grown tree like a maple or Douglas fir is going to cost \$1,000 to \$1,500 to remove, minimum. Most builders will avoid that cost and position their home around the tree if it is functionally possible. They have just saved at least \$1,000 in expense and have preserved some intricate value to their betterment in the sale of the home...Many trees may not be best preserved for the site...Saving a tree that needs to be trimmed to the extent that it is off balance because you need to work a home around it creates a dangerous situation. Likewise, trying to save a Douglas fir, a tree with limited root structure, next to a home may well be a dangerous situation also.” <i>Jeff Fish, Fish Construction NW, Inc. (4/13/10)</i></p>
<p>“The Bureau of Environmental Services does favor the drafted tree policy to enhance the control and cleansing of storm water. However, nearly all new construction on the east side of Portland takes the water from the roof of the structure and deposits that runoff water directly into a soakage trench or drywell. For the most part new construction greatly reduces the water runoff from the site without the use of trees over the previously undeveloped site, especially if there were a limited number of trees on the site. Maybe tree policy should be classified by the soils under the trees; essentially the eastside of Portland where most of our housing density is developed being less restricted, and the west side where we have hill sides, more clay type soils, landslide potential, and other risk factors having some greater restrictions.” <i>Jeff Fish, Fish Construction NW, Inc. (4/13/10)</i></p>
<p>“Encouraging tree preservation and requiring tree mitigation for tree cutting in development situations is a significant and noteworthy addition to achieving City tree canopy goals. Development and especially in-fill development is its own important City goal but is contributing to loss in mature tree canopy. City tree inspectors find that most of the mature tree cutting they investigate is associated with development actions. Any manner that the City can find to encourage more tree preservation during development and to require mitigation for canopy loss is positive. Contrary to what is oftentimes expressed, tree preservation is not a lose-lose proposition for developers since scientific study after study indicates that mature trees enhance property values and increase salability. Builders may well see higher profits if they retain trees during development, thus reducing building costs, and pricing accordingly since the development can now be sold with mature plantings already established.” <i>David McAllister, City Forester, Portland Parks and Recreation (4/12/10)</i></p>
<p>“The proposed tree policy guidelines have been carefully developed, with ongoing dialogue and outreach to all stakeholders. The proposal is carefully balanced to integrate development with the preservation and planting of trees. The proposal allows many options and possibilities for how one can plan and approach a site using a more flexible performance based approach vs. a prescriptive approach. If the goal to is to balance development with a healthy tree canopy, then this can be shown to be done through allowing flexibility in setback, height, and lot coverage requirements.” <i>Simone Goldfeder, Architect LEED AP (4/4/10)</i></p>
<p>“It is not possible to anticipate every potential design variation for every type of site, as there will always be different and unique situations. It is important that the City analyze as many potential options as possible and if the new guidelines are implemented, carefully track and review the implementation over time. This could be done through a performance verification and revisions considered similar to recent reports like the Land Division Study and Infill Report that were issued by the City.” <i>Simone Goldfeder, Architect LEED AP (4/4/10)</i></p>
<p>“I would like to express my support for the adoption of measures within the proposed Title 11 Tree Code to preserve existing tree canopy within the Portland metropolitan area on both public and private land, especially in those cases when the land is subject to "development." In my own NE Portland neighborhood I have personally witnessed the unnecessary removal of majestic, mature conifers to make way for the construction of perfectly monstrous and hideous houses that neither respect the neighborhood architecture nor display any sensitivity to harmonize with the surrounding environment...The developers have no vested interest in beauty, wildlife habitat or the long term livability of our neighborhoods. I particularly urge you to: ...Require that all new construction incorporate, whenever possible, existing trees on the site into the plan. Priority should be given to the preservation of healthy trees, not to the construction of the largest possible structure.” <i>Richard Weber (3/28/10)</i></p>

<p>“Need for a tree hierarchy as part of preservation standard. The public draft is written in a way that it could be interpreted as a hierarchy, but is actually a menu of options (i.e. preserve, plant, or pay) reliant on incentives to create the preservation preference. BES advocates a code or administrative rule specifying a hierarchy of preservation first to the degree possible, requiring movement of structure footprints around the site (as allowed by current codes) to avoid tree root protection zones. The next option would be mitigation on-site, on street frontages, or off-site. Last would be payment in lieu of preservation or mitigation.” <i>BES Tree Code Option, Bureau of Environmental Services (4/27/10)</i></p>
<p>“The policies need to provide clear and objective standards. For example, having a hierarchy (e.g. first option preserve, second option plant, third option pay) means an applicant would have to first show that it was not practicable to preserve a tree, before they could move on to the next step of planting new trees, and then the applicant would have to show it was not practicable to plant the new trees before they could go to the payment option. Land Use law draws a sharp line between standards that are clear and objective, and standards that involve discretion. To require that a tree be preserved if it is "<u>practicable</u>", is discretionary. The reason this is important is that if discretion is used, than a Land Use Review is required. It makes no sense to send every Building Permit application through a Land Use Review to consider if tree preservation was practicable or not. It is critical to keep the standards clear and objective, and not introduce discretion at the Building Permit stage.” <i>David Nielsen, Chief Executive Officer, Home Builders Association of Metro Portland (4/27/10)</i></p>
<p>Tom Skaar, reported that the Urban Growth Boundary and Metro’s policies direct development on infill lots. He stated that the goal to increase tree canopy from 26% to 33% is arbitrary, and neighborhoods such as Laurelhurst and Eastmoreland achieved tree canopies without regulations. He questioned the timing of the project in a down economy when BDS has cut staff. He questioned comparisons to permit regulations in other cities such as Atlanta that have deciduous trees and considerable sprawl. He said trees have life cycles and can be replenished, the City can acquire land to reforest, and he supported a letter from Bureau of Development Services questioning proposals. Mr. Skaar said the suggested in-lieu fees of \$600/tree seem higher than what it really costs to plant or preserve a tree, and it all relates to affordability. Mr. Skaar acknowledged that a local improvement district would be the fairest revenue approach if people are willing to pay for it. – Tom Skaar, Home Builders Association, Pacific Western Homes, Excerpt from (3/23/10)Joint Planning and Urban Forestry Commission Minutes</p>
<p>“Offsite mitigation "in-lieu of" fees appropriate to development types. Development proposals and those absent development, and homeowners and commercial business applicants must be sized to instigate appropriate mitigation. A two-or three-tiered in-lieu of mitigation fee system, providing credit for meeting part of the 35% preservation standard, is needed to reflect the economics of the various scenarios.” <i>BES Tree Code Option, Bureau of Environmental Services (4/27/10)</i></p>
<p>“Ensuring that a strong tree canopy continues to develop over time is a different goal than simply preserving existing trees. While mature trees have value, our belief is that the policies need to provide more flexibility and focus on the long-term goal-ensuring a healthy tree canopy continues over time. Portland's overall tree canopy has not suffered under the existing tree policies. There are very few examples of violations of tree codes by the development/building community over the years. In fact, there are many examples of neighborhoods whose tree canopy was significantly improved (e.g. Eastmoreland and Laurelhurst) as a result of being developed.” <i>David Nielsen, Chief Executive Officer, Home Builders Association of Metro Portland (4/27/10)</i></p>
<p>“Contrary to what developer Jeff Fish believes (Fish Flies at Trees - SE Updates, May, 2010), there is nothing emotional about the fact that cutting down a tree on one piece of property effects the ecology of surrounding properties, and when this action is multiplied, the entire city's ecosystem is compromised...Most people know that healthy, plentiful trees are beneficial to the city environment...They're also good for property values... The preservation of trees is important for both the city's environment and budget and essential if Portland is to remain on the list of Tree Cities USA...Portland must insure the preservation of the urban tree canopy and make it a priority before it's too late. Simply allowing developers to mitigate by planting trees is not acceptable. Stricter regulations must be applied and fines levied for non-compliance. Preservation should always be the least expensive option. In San Francisco, mature trees are treated like historic buildings. We can have this model for Portland, too. Increased regulations and a greater focus on preservation, instead of just planting, will insure the livability of our city, environmentally, aesthetically and economically, for generations to come.” <i>Lisa Gorlin (5/6/10)</i></p>

"I was moved to tears seeing many trees clear cut in my Kenton neighborhood. This act of destruction motivated me to contact Urban Forestry. From there I gathered that lots that are that are segregated vs. divided lack any protection or preservation for trees. I then investigated further hoping to find that the loop hole would be closed inside the New Portland Tree Plan. I found that the original plan it had, but now it isn't again. It seems the development community in its quest for quick profit have convinced your committee away from this protection. I'm here to say they are wrong. The segregated lots, that housed much wildlife, now will contain two row houses. These houses are undesirable (as many are not selling in my neighborhood) and unaffordable (medium income in Portland couldn't support buying one.) This kind of development does not support Portland's long term planning around substantial, affordable, high density housing. In the same space could have been built a multiple unit dwelling. The heritage worthy tree and many others could have been saved. The finished units would house more people and be more affordable. I understand that lots under 3000sf have no mitigation for removing trees. That all you'll need is a building permit. There will no Tree Preservation Plan. No contributing to planting or protecting other trees in the watershed. These lots may only represent 4% of Portland's lots. But isn't it's Portland's Plan to maintain the urban forest?..." Nicole Leggett (5/10/10)

Response: Staff recognizes the different perspectives held by stakeholders in considering how trees should be addressed during development. While some support stronger requirements to preserve existing trees, especially high-quality large and healthy trees, and trees on property lines and adjacent sites, others point out that preserving specific trees on specific sites is not always feasible or desirable, and that tree canopy can also be achieved in the future by planting trees. The proposal will be revised to reflect direction provided during the PC/UFC work sessions. The revisions should respond to a number of the issues raised.

First, staff was directed to reduce the tree size threshold for application of the preservation standard from 20 to 12" in diameter as suggested by a number of stakeholders. This will provide greater consistency with trees in non development situations, and increase the pool of trees from which developers can choose to preserve. Preserving smaller trees may provide greater flexibility in site layout since required root protection zones are typically smaller.

Second, to offset increasing the pool of trees to be addressed the preservation target will be lowered from 50% (of 20"+ trees) to 35% (of 12"+ trees) in the next code draft.

Third, the commissions endorsed retaining a standard that establishes a target for preservation on development sites. The next draft will continue to propose "clear and objective standards" for trees in development situations, rather than shifting to a hierarchy approach that would have introduced additional discretion resulting in increased cost, time and uncertainty in the building permit process. The preservation standard provides an important policy message about the priority of preserving existing mature trees. In addition, the mitigation required if the preservation target is not met, will compensate for the loss of trees and provide an added incentive to preserve. This mitigation and additional preservation incentive would not exist if only a tree density or T1 approach was taken (see I.C, Building Permits-Tree Density, below).

Fourth, the revised draft will exempt sites less than 3,000 square feet in size and sites where a development is proposed with 90% building coverage from the preservation standard. This acknowledges that development constraints in these situations make it impractical to retain trees. However, while additional tree mitigation would not be required for these sites, tree density standards would continue to apply to all development sites. This would ensure a baseline amount of trees are maintained over time through a "preserve, plant or pay to plant elsewhere in the watershed" approach.

Finally, the original multiple tiered mitigation standard was replaced by a single mitigation requirement (2:1) for the sake of simplifying the standards.

The revised draft will also continue to contain flexible development standards to encourage tree preservation; however the commissions did not direct staff to add standards allowing modification of height, setback or building coverage standards without an Adjustment.

	<p>Self-Certification System for Inspections</p> <p>BDS strongly recommends against a self-certification approach to ensuring trees are preserved or planted as required. On the surface it sounds simple and like it wouldn't cost very much to administer it. However, in our experience in trying a similar approach with landscaping, the administrative work associated with self-certification was very time-consuming. First, it would require new programming in TRACS to be able to track these projects...It would also require staff time each week to figure out which certifications should have come in each week, and follow up... In our experience with the landscape self-certification program we tried, it was not a success. Inspections are far more effective and worthwhile. If there is any funding available to help the tree project succeed, it would best be used to get inspectors in the field, particularly those with arborist expertise. Currently BDS does not have sufficient inspections staff for even the most basic building, structural, electrical, and plumbing inspections. We have no arborists on staff, and have no funding to pay for time and expertise from the Urban Forestry staff at the Parks Bureau. Arborist expertise available to BDS from early customer assistance, during the review process, and during the construction process, is a critical need and essential to making any tree regulations successful." <i>Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (5/11/10)</i></p> <p>Response: <i>The initial draft proposal includes required inspections at the beginning and end of the construction process, and authorized an optional inspection during construction. This level of inspection was identified as a significant program cost that can not be absorbed at this time. In order to reduce costs, staff recommended to the Planning Commission and Urban Forestry Commission a spot check inspection system until there is funding available for a more robust inspection system. A limited amount of consultation time by Urban Forestry staff arborists for building permit and land use reviews is included in the cost estimates. A self-certification system is not proposed.</i></p>
	<p>Equity</p> <p>"If one looks at an existing plan of the City or Portland and the current canopy cover, it is clear that much of the canopy is located in the more affluent areas of the cities. Much of the canopy loss in the last 5, 10, 20 years from development within the City of Portland has occurred in East Portland, North Portland and other poorer areas of the City. These parts of the City, in particular, have few if no regulations protecting trees. For example, many of the existing environmental zones are currently located and mapped in areas of Portland with steep slopes and streams. These are primarily areas in the southwest, northwest and some portions of the southeast. ...In most of other areas of the City, there are no protections, especially in economically less affluent areas of the City." <i>Simone Goldfeder, Architect LEED AP (4/4/10)</i></p> <p>Response: <i>The proposal goes a long way in integrating tree preservation or replacement to those areas where the impact of tree loss is greatest. Through the universal permit and tree preservation and density standards, those areas where tree canopy has been lost will eventually see gains over time. In addition to these regulatory programs to ensure tree replacement, programs for proactive planting will continue to be vital to ensure increases in the urban canopy and to backfill already tree deficient areas.</i></p>
	<p>Insufficient penalties for violations</p> <p>"I suggest requiring fees--& enforcing them immediately-. that will cover the cost of replacing any trees of 6" diameter or greater. That should be applied to all trees harmed by vehicle weight, etc. man-caused root damage (to their inevitable death) or felled without permit. Focusing only on really large diameter trees or allowing trees to be replaced with twigs puts us years behind in recovering from the harm someone caused just to ease development or prioritize his or her own view over that of everyone else." - <i>M'Lou Christ (3/21/10)</i></p> <p>"I've seen commercial developments in NE where a mix of trees was required. But after a few months the conifers were all removed, presumably to increase visibility of signage? Whatever the reason, there is no reason to go through all the planning if the developer is going to undermine the requirements with no consequences." <i>Robert Elan (4/12/10)</i></p>

Response: For development permits subject to a menu option of preserve, plant, or pay in lieu of planting, the enforcement system needs to be judicious in assessing fines. If an applicant perceives he/she bears a greater cost risk for preserving trees (through potential fines) than costs for simply removing and replacing the tree, tree preservation will become less appealing.

In cases where the city exercises discretion in evaluating whether a tree should be removed or retained, and where there is far more communication with applicants about City requirements and options, fines for violations can and should be more punitive. This could apply to large trees where no development is occurring or for trees preserved as a condition of land use approval.

In any regard, the enforcement provisions in Title 11 focus primarily on replanting trees quickly, keeping process to a minimum for cases where the responsible party cooperates, and provides for additional fines and remedies depending on the severity of the violation.

I.C. Building Permits – Tree Density

Tree Density Standards – Concept and Levels

“BES supports the proposals related to property development, both during the land use and building permit stages...By providing tree density standards for all property uses, the City is again reinforcing that every tree is part of our collective green infrastructure and that equity across properties is important.” *Dean Marriott, Director, Bureau of Environmental Services (3/22/10)*

“We strongly encourage the Commissions to request that staff take a further look at Tree Density Standards (Page 135 of Volume 2). We believe that the tree density standards were set too low. We believe that in each of the categories listed could easily absorb increased density. For example under the proposed regulations an average 5000 square foot city lot would be required to have a density of only a single tree unit. We would request that staff reconsider whether higher tree densities should be required.” *Bob Sallinger, Conservation Director Audubon Society of Portland; Jim Labbe, Urban Conservationist, Audubon Society of Portland; Mike Houck, Executive Director, Urban Greenspaces Institute; Ron Carley, Co-director, Coalition for a Livable Future; Jill Fuglister, Co-director, Coalition for a Livable Future (3/23/10)*

“...FOT feels the tree density zone %ages as outlined on pg 135 Title 11 fall far short of what is necessary to accomplish the stated canopy coverage goal. They seem very low when looked at in the face of the value trees bring. These numbers seem to overwhelmingly undervalue the community benefits trees provide specifically with regard to lot size. For example, 1 tree per 3,000 - 5,999sq ft on residential lots seems far below stated goals and seems to vastly undervalue trees not just to the residential owner, but the greater community at large.” *Scott Fogarty, Executive Director, Friends of Trees (4/13/10)*

“Requiring a 15% tree density standard on industrial sites would further diminish the already inadequate industrial land supply in the City of Portland. IG2 zones and IH zones currently require no minimum landscaped area. Over time, a lack of industrial land will force businesses to locate outside of Portland, likely increasing greenhouse gas emissions and further reducing the City's fragile economic base.” *Tom Bouillion, Planning Manager, Marine & Industrial Development, Port of Portland (4/13/10)*

"As an alternative to the proposed tree regulations, HBA would like to suggest that the City review its current "T1 standard"...and consider the following: 1. Currently the T1 standard only applies to new single-dwelling development...There has been no evidence provided to show that this standard is ineffective, and it can be assumed that the standard has resulted in some increase in tree preservation and tree planting (either on site or through the Tree Fund). 2. Propose that the T1 standard be expanded to apply not just to single-dwelling development but to all "New Development" in Single-dwelling, Multi-Dwelling, and Commercial Zones...There needs to be an exemption for lots that are in zones that allow 100% building coverage...3. Modify the T1 standard to allow any tree planted for code/regulatory reasons on a lot (e.g., street trees, trees for storm water mitigation) to count towards the T1 requirement...4. If there is some desire to preserve existing mature trees as an added value to our overall tree canopy, then provide incentives to accomplish this. One suggestion would be to provide a credit towards a stormwater SDC or fees for any trees beyond a certain diameter that are preserved on an existing lot. The advantages of modifying/adapting the "T1 standard" are several. The standard is simple to explain, and easy to understand, and contains clear and objective standards. It provides certainty to property owners about what their options are, while at the same time provides the flexibility needed for different situations, while keeping the costs of administration down." *David Nielsen, Chief Executive Officer, Home Builders Association of Metro Portland (4/27/10)*

"The Bureau of Development Services proposes the following regulatory solution for trees in development situations. This is a solution that will be clear, and simple, and cost-neutral. It will also achieve: An increase in the number of trees preserved; An increase in the number of trees planted; An increase in money paid into the Tree Fund, which will in turn result in more trees planted...Simply modify and expand the "T1 standard" that is currently in the Zoning Code (Section **33.248.020.H**)...The T1 standard has been a success in increasing tree preservation and tree planting in the City, and we recommend building on that success.

We propose that the T1 standard be expanded to apply not just to Single-Dwelling Development, but to all projects that increase building coverage on a lot in Single dwelling Zones, Multi-dwelling Zones, and Commercial Zones (except on lots in the CX, CM, and CS zones, where the zoning is trying to achieve a more built-up urban form and greater building coverage of the lots.)...Also, it is our strong recommendation that the existing T1 standard for tree planting be modified slightly from 2 inches of tree diameter per 1,000 square feet of site area to one inch of tree diameter per 1,000 square feet of site area. The current requirement...results in overplanting to a level that does not make sense, especially when the property owner is required to keep these trees alive to maturity and required to replace the ones that might die.

The following is some data on how the T1 standard has performed. We used a sampling of 100 permits for new single-family residential development from 2006, in a variety of geographic areas across the City...Our findings are as follows: # of permits with tree preservation: 24 out of 100 (24%)...If we look at the lots in the sample that were 10,000 sf or less: 14 of the 87 (16%) preserved existing trees on the site...[see letter for additional data results]...This data demonstrates that the existing T1 standard is quite successful in promoting a healthy forest, consisting of a percentage of older existing trees preserved and a percentage of new trees that will each year continue to add to the City's tree canopy...

In summary, our proposal to expand and modify the T1 standard is a solution that will achieve the goals of preserving and planting more trees in the City, keeping the regulations simple for the public, and keeping the administrative costs low. We believe it is the best solution for the following reasons:

- It is simple and builds on a system already in place and familiar to the public;
- It offers certainty (preserve, plant or pay into the Tree Fund);
- Administration is simple and requires minimal staff time both in explaining the regulations and options, as well as in the plan review phase. (As stated before, if funding is available, it would best be directed at providing arborist expertise and inspections.);
- It provides flexibility for different site and development situations; and
- With the changes we propose to the planting density portion of the T1 standard, it is practical and reasonable."

Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (5/11/10)

	<p>John Fiocchi asked for further review of the feasibility of requirements and impact of proposals on builders. He stressed that most builders want to make lots look presentable, the City already is ranked as a green city, and proposed costs are excessive for someone who already pays taxes to support schools. He said it's necessary to address site-specific issues related to tree removal on each different lot, which general regulations can't do. <i>John Fiocchi, WE-BE Homes, Inc., Excerpt from (3/23/10)Joint Planning and Urban Forestry Commission Minutes</i></p>
	<p>Response: <i>Support for and concerns about the proposed Tree Density Standards are duly noted. Staff is reviewing the proposed Tree Density Standards to ensure that they are not overly complicated, and that the quantity of trees is appropriate for the development type and lot size. The intention is to set a standard that is practical for all uses. Staff intends to refine the proposed tree density requirements so that they follow a more familiar standard akin to the existing T1 and other landscaping requirements, to further simplify and streamline the requirement. For instance, the "tree unit" terminology will, in the next draft proposal, be replaced with the existing "small, medium, and large" tree terms that already exist in the Zoning Code. This will make it easier to apply credits for trees planted to meet other landscape requirements, while continuing to encourage larger canopy trees. The revised draft would continue to apply this standard to all types of development, with varying levels of required tree density that acknowledge differences between development types (e.g. single family house vs. industrial). Staff is considering modifying the proposed density standards for industrial and employment uses to recognize both the anticipated level of development and the freight movement and circulation required on these sites.</i></p>
	<p>Proposed Code: 11.600.060 (A-3) Tree Preservation Standards, and Table 600-6 Tree Density Standards for site and street trees</p> <p>Comment: We are very concerned with the Replacement Tree Specifications, and particularly, the standards of Table 600-6. This table requires one site tree unit per 1,000 SF of "development impact area" or 15% of site area. Typically, industrial development (which we assume also includes employment uses) would result in disturbance of 85% or more of the site, depending on how much grading is required to provide a suitable building pad. We do not understand the relationship of this tree replacement requirement to the number of trees that are impacted. For example, it appears if one tree or 50 trees are being removed, that the one per 1,000 SF standard applies based on 15% of site area, or the amount of development impact area. Therefore, regardless of the number of trees removed, for a five-acre site, it is likely 33 tree units could be required to be provided, which appears to be in addition to trees already required for parking lots and perimeter landscaping. Using the City's figure of \$300 per 1/3 tree unit, this would result in \$29,700 replacement cost for removal of only one tree on the site.</p> <p>As a general comment, this chapter appears to include code that is difficult to understand and does not appear to have a clear relationship between tree removal and replacement. The commentary is not clear on how these limitations (i.e., 15%, one unit per 1,000 SF, etc.) were established. Lastly, the reference to 11.600.060.A.2.c in the footnotes of Table 600-6 appears to be an error. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>

<p>Response: <i>The concern above seems confuse the tree preservation standards with the tree density requirements. The proposed Tree Preservation standard, and associated mitigation requirements, relate to the number of existing trees of certain size or larger on the site. The proposed Tree Density standards are intended to ensure that a baseline minimum amount of tree canopy will result after development regardless of how many trees are present on a site prior to development.</i></p> <p><i>The tree density requirements for industrial sites would be calculated by subtracting 85% of the site size and dividing by 1,000 square feet to determine the number of tree units required. From the total number of tree units, applicants are credited for any trees planted to meet parking lot, perimeter, and other landscape requirements, stormwater facility requirements, and for any other trees planted. Additional credit is awarded for trees preserved on the site, including those preserved to meet the preservation standard. In cases where an applicant retains no trees and plants no trees, then the payment in lieu of planting would assessed to plant trees elsewhere in the watershed.</i></p> <p><i>The proposed Tree Preservation standards, as revised per direction from the Planning and Urban Forestry Commissions, would require that 35% of the existing trees 12" and larger on the site be retained. Again, any trees preserved would count and receive extra credit toward meeting the Tree Density standards. Removal of more than 65% of the eligible trees would trigger mitigation for each extra tree removed. Mitigation payment would be required in addition to trees required to be planted to meet the tree density standard. Note: In the initial draft proposal mitigation could be achieved through planting or payment in lieu. In the next draft proposal staff will be recommending that mitigation be achieved through payment in lieu only, since the density standards will ensure adequate canopy over time and to prevent overplanting of trees on development sites.</i></p> <p><i>Finally, the referencing error has been noted, and will be corrected.</i></p>
<p>Tree Size at Planting and Maturity</p> <p><i>"You will hear phrases like, "Portland is becoming a city of small trees." Please ask the question, do they mean "young" trees, which are small because they are young, or do they mean "small" trees, trees that will be small even at maturity, like Japanese Maples? We've heard complaints about the "sticks" people have planted. The "sticks" will eventually become large trees. We need to think long-term. Healthy forests need to be re-generated continually over the long-term, and this happens through the planting of new, "small" trees that at maturity will contribute to the city's tree canopy... Also, it is important to plant the right tree for the right place. With a significant amount of our infill development being on lots 5,000 square feet and smaller, it may be both impossible to preserve a large tree, and appropriate to plant a tree that will, at maturity, be smaller than what was there previously." Rebecca Esau, Manager, Land Use Services Division, Bureau of Development Services (3/22/10)</i></p> <p>Response: <i>One concern expressed by stakeholders relates to the gradual conversion of the urban forest from large native and non-native canopy type trees to smaller, primarily non-native trees. The proposal is intended to address these concerns to some extent through the design of the proposed flexible development standards, preservation standards, tree density standards, and new qualitative criteria in land divisions.</i></p> <p><i>These standards and criteria place a priority on large healthy trees and native trees. The new land division criteria call out these trees explicitly, while the tree density standards encourage planting of larger canopy trees by requiring fewer of them to meet the standard. This provides the flexibility necessary to ensure the right tree can be planted in the right place.</i></p>
<p>Tree canopy goals, canopy strategy, space for trees</p> <p><i>"The decision that tree canopy needs to be increased form 26 to 33% seems somewhat arbitrary and has little consideration of the impact this would have on other city goals and needs." --- David Nielsen, Chief Executive Officer, Home Builders Association of Metro Portland (3/23/10)</i></p>

<p>"Comparisons of tree canopy to other cities selectively... That is just comparing apples to oranges....when you have larger lots it is quite easy to maintain or plant tree canopy. Measuring tree canopy without looking at how much land is preserved through our UGB system isn't making a fair analysis... Portland's tree canopy report was conducted using a few selected random plots of governmental sites. This is far too narrow a site selection to compare Portland's tree canopy to that of other cities...random samples were not taken from private sites- the sites that will be most effected by tree policy." <i>Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</i></p>
<p>"Why if so many neighbors are clamoring for added tree canopy, are they not adding tree canopy in their personal yards? ...Why not assist neighbors by purchasing trees and allowing them to increase canopy in their existing yards first? Not everyone wants additional tree canopy in their yards. Many people enjoy the benefits of additional sunlight in their homes." <i>Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</i></p>
<p>"Between 1972-2002, Portland's urban canopy increased by a total of 1.2%. At this rate it would take another 169 years to add the additional 6.7% necessary to achieve Portland's canopy target of 33% coverage. This proposal set's Portland on a much more ambitious trajectory, one that city policies have repeatedly recognized is necessary to maintain a sustainable and livable urban landscape." <i>Bob Sallinger, Conservation Director Audubon Society of Portland; Jim Labbe, Urban Conservationist, Audubon Society of Portland; Mike Houck, Executive Director, Urban Greenspaces Institute; Ron Carley, Co-director, Coalition for a Livable Future; Jill Fuglister, Co-director, Coalition for a Livable Future (3/23/10)</i></p>
<p>"Trees need more space to grow. The concrete structures surrounding tree trunks and roots, hinder their growth. within 25 - 100 year they are pushing up sidewalks, and house foundations. Since the life expectancy of many of our native and ornamental trees can be several hundred years, this should be considered. If left unresolved this leads to health and safety issues." --- <i>Jo Carney (3/16/10)</i></p>
<p>"Please do what is right and support the maintenance and the growth of our urban tree canopy in Portland. The benefits of protecting our current canopy and planting new trees to increase the canopy for the future are priceless!! Please help to protect what makes Portland the best place to live: Our Trees." - <i>Cheyne Cumming (3/20/10)</i></p>
<p>Response: <i>The 2004 Urban Forestry Management Plan establishes tree canopy targets by general land use category. The targets are intended to be both aspirational and reasonable for the given land uses. Staff agrees that the City ought to develop a comprehensive strategy for establishing and maintaining adequate tree canopy into the future, taking into account anticipated future growth and the broad array of City goals. Staff also agrees it would be helpful to have better information on the composition of Portland's tree canopy on private property and City owned and managed property, and that comparison of Portland's canopy to that of other cities should be done mindfully and with appropriate caveats. The targets could also be revisited and adjusted at some point in the future to reflect more information or changing conditions or priorities. In the meantime the targets call for increasing and improving Portland's tree canopy to help meet the City's urban forest management goals.</i></p> <p><i>In addition to increasing canopy, the 2004 UFMP also calls for equitable distribution of the benefits of the urban forest to all Portland residents. The proposal will address canopy quantity and distribution by more effectively and consistently addressing trees in development and non development situations across the city.</i></p> <p><i>The proposal does not go so far as to address typical development form allowed by the City, planter strip widths etc. These types of urban form/design issues should be addressed through projects such as the Portland Plan.</i></p>

<p>Proposed Code: 33.248.030 (D-1) Plant Materials: “Existing vegetation. Existing vegetation except those plants on the Nuisance Plants List may be used to meet the standards, if protected and maintained during the construction phase of the development, as specified in Section 33.248.065. If existing trees are counted as follows: a. Each tree between 1.5 inches and 6 inches in diameter counts as ½ tree unit; b. Each tree greater than 6 inches up to 12 inches diameter counts as 1 tree unit; c. Each tree greater than 12 inches up to 20 inches counts as 2 tree units; and d. Each tree greater than 20 inches diameter counts as 3 tree units.” Comment: It is unclear how existing trees required by City code for previously developed parking lots, etc. will be counted for non-conforming upgrade requirements (or if partial redevelopment is proposed). For example, if the perimeter landscape requirement is one tree unit per 30 LF, but an existing landscape area currently includes trees that are less than 6" in diameter (but met code at time of planting), it is unclear if it is necessary to plant additional trees since the applicant would only receive credit for ½ tree unit. It is unclear what the case would be if the current density and spacing do not allow additional trees to be planted. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
<p>Response: The proposed change in this code section was intended to convert existing terminology (small, medium, large trees) to tree units consistent with the Title 11 proposal. Based on comments received about the need to simplify the code proposal, staff have evaluated other options to measure the number and size of trees required, and will be revising the proposal to use the existing small, medium and large tree terminology. Therefore, the current landscaping standards in 33.248 will not change and as such landscaping upgrades would not be triggered on sites that were developed under the current landscaping regulations. However, non-conforming upgrades to meet Title 11 tree density standards may be triggered (see response under 33.258 below).</p>
<p>Proposed Code: 33.248.060 Landscape and Tree Plans: “For the purposes of meeting Chapter 11.600, Trees in Development Situations, a Tree Plan must be submitted showing the trees on site to be retained and methods for their protection, trees to be planted to meet Tree Density requirements and street trees to be protected and planted. Applicants may submit a combined Landscape and Tree Plan, when all of the information can be shown in a clear and legible manner. Tree Plan requirements that apply at the time of land use review are specified in Section 33.730.060.” Comment: We are concerned that the extent of area that a tree plan must include is not clear. For example, if only a portion of a large site is being developed or redeveloped, then it is unclear what assurance would be provided in the code that an unnecessary survey/inventory of existing trees on the entire site would not be required. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
<p>Response: Applicants for large sites (greater than 1 acre) may show a “development impact area” essentially limiting the extent of required tree inventory (see sections 11.600.050.3.a and 11.600.070.2.c. in the initial draft proposal)</p>
<p>Proposed Code: 33.258.070 D-1 and D-2) Nonconforming Development: “a. Landscaping required for the following areas:” “Tree density standards of Chapter 11.600” Comment: As noted above, it is not clear if this means that anytime the non-conforming upgrade threshold is met, that the number of tree units must be recalculated and complied with each time a permit is requested. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
<p>Response: The intent is that the tree density standards would be handled like other development standards when non-conforming upgrades are triggered. Applicants would continue to have the option to decide which improvements to make to fulfill their non-conforming upgrade requirement. Tree density is complicated somewhat by the option to pay a fee in lieu of planting. There will need to be a method of tracking these payments so that applicants aren’t required to pay or plant additional trees when subsequent development is proposed. This is similar to how bicycle parking is administered.</p>
<p>Proposed Code: Chapter 11.600 (Table 600-1) Applicability of Tree Standards in Development Comment: The threshold of \$25,000 for additions and alterations is not realistic (i.e., too low). It is quite possible the requirement to plant trees could approach the cost of the minimum threshold in the code (i.e., \$25,000), depending on the amount of street frontage, need for tree wells, etc...for example, we will use a \$25,000 interior alteration on a five-acre site with a 450 LF street frontage (assuming no corner lot). This example could result in planting of 18 street trees. Assuming \$500 per tree, this could result in a \$9,000 street tree requirement for a \$25,000 project (in addition to other permit costs).” <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
<p>Response: Staff agrees with the concern for potential disproportionate costs associated with adding street trees. The revised draft will include a 10% of project value cap on street tree improvements, similar to the non-conforming upgrades for on-site improvements. Also, when the required number of street trees are present, no street tree upgrades would be required.</p>

I.D. Protecting Trees on Property Lines and Adjacent Sites during Construction

“The Council agrees with the Forestry Commission that emphasis during the development process on preserving high-quality, large, and healthy trees over simply the number of trees, as well as protections for trees on property lines and adjacent sites, will help ensure that we protect the urban forest canopy.” *Terri Preeg Riggsby, Chair, Tryon Creek Watershed Council (3/22/10)*

“As stewards and advocates of watershed health and restoration, the West Multnomah Soil & Water Conservation District (WMSWCD) spends significant staff and volunteer time, as well as financial resources on projects designed to protect existing tree canopy and plant native trees. We ...believe the...protections for trees on property lines and adjacent sites will help ensure that we protect the urban forest canopy...” *Brian Lightcap, Chair West Multnomah Soil and Water Conservation District (3/18/10)*

“Many of the sights we build on are 2,500 square feet or less. If the site is 25' x 100', that gives the builder a very narrow footprint of 15 feet to build within, with no options to move the home. Tree preservation reaching over the property line, up to 15 feet on to the property, will greatly influence that footprint. The situation is made even worse on a 50' x 50' or less lot...Tree preservation in such a case is nearly impossible.” *Jeff Fish, Fish Construction NW, Inc. (4/13/10)*

Harry Schumacher provided anecdotes from his experience as a developer, including contradictory advice from arborists and City staff (about tree condition and protection methods), as well as efforts to plant trees when he builds homes, works with Friends of Trees and plants at his own home. He suggested that trees planted by Friends of Trees are growing and have increased the City’s canopy, so that it might not take much more planting to reach 33 percent. - *Harry Schumacher Excerpt from (3/23/10)Joint Planning and Urban Forestry Commission Minutes*

Response: *Support and concern for proposed protection of trees on property lines and adjacent sites is duly noted. The Planning Commission and Urban Forestry Commission have expressed preliminary support for revisions to the initial draft proposal – revisions that would hone and somewhat scale back requirements for protecting trees on property lines and adjacent sites. Trees on property lines could be counted toward meeting tree preservation and density standards, but only if protected. Protection for off-site trees in building permits would be voluntary. Protection for trees on adjacent sites would be considered during land divisions and public projects. The initial draft proposal and revisions are both intended to improve protection for these trees while also ensuring that the regulations to not make allowed development impractical or unduly costly.*

I.E. Trees in the Environmental Overlay Zone (e-zone) and other resource areas (overlay and plan districts)

“The Johnson Creek Watershed Council concurs with the comments submitted by Audubon Society of Portland, Coalition for a Livable Future and Urban Greenspaces Institute regarding the Portland Tree Policy Review and Regulatory Improvement Project. In addition, we wish to express our support for several proposed amendments...Proposal to delete the allowance in Zoning Code chapter 33.537, Johnson Creek Plan District for removing trees within Johnson Creek below the ordinary high water level...Proposal to apply tree removal and replacement standards to the outer 25 feet of environmental zones citywide (what are known as transition areas)...Proposal to change the definition of “Identified Wetlands, Identified Streams, Identified Waterbodies” to include resources identified on the resource inventory map, **or** in the resource inventory text. Every year, the Council and its volunteers plant thousands of trees along Johnson Creek and its tributaries to provide shade, erosion control and future large woody debris recruitment. The proposed amendments are necessary to protect our investment in the long-term health of the creek.” *Matt Clark, Executive Director, Johnson Creek Watershed Council (4/12/10)*

“I appreciate the requirement for replacement trees when the removal of nuisance trees results in an environmental zone that is vulnerable to erosion and degradation.” *Margot Barnett (4/1/10)*

<p>“There are two elements of concern for managing the natural areas that we would like to raise for your consideration. The first involves the city's lack of a master planning process that would allow Metro to seek a 10-20 year approval for management activities that currently require individual reviews. The second involves the existing Natural Resource Management Plan (NRMP) process and how out-of-date and burdensome it has become. The city does have a master plan land use review process, but it is applied only to institutional campuses such as hospitals and colleges...There is no similar process for natural resource areas, yet the management of large land areas for habitat and people require levels of analysis and review similar to those applied to campuses...From the title, one would think the NRMP provides a solution to the issue of master planning for an area. This is not so - since the NRMP is a legislative process, it must be approved by both the Planning Commission and City Council and because of this is almost impossible to update. Long-term management of natural areas requires some flexibility to allow for changes along the way - our understanding of ecosystems is constantly evolving and we need to be limber in order to provide the best practices to these important systems.” <i>Jim Desmond, Director, Sustainability Center, Metro (4/12/10)</i></p>
<p>“I'm especially pleased to see the proposed changes that require replacement of trees removed from the transition zone (within the environmental zone). This is critical for riparian areas, which tend to be long and narrow with a considerable portion of the environmental zone falling within the transitional area. Will these new tree codes apply within Plan Districts like the Columbia South Shore Plan District? Because some of these plan districts have their own environmental requirements, citywide code changes don't always apply within the plan district area. Is there some way to make sure that the new code sets a minimum standard that applies to all plan districts, while still allowing them to have more stringent codes as appropriate?” <i>Linda Robinson (4/13/10)</i></p>
<p>“One proposed change of special interest to the Council is the one that would require mitigation for trees removed from the transition zone within the E-Zone. It is especially important to provide and protect vegetated buffers along sloughs and wetlands with narrow riparian areas. We support this change.” <i>Jane A. Van Dyke, Executive Director, Columbia Slough Watershed Council (4/9/10)</i></p>
<p>Response: <i>Staff recognizes this support for addressing trees more consistently in existing environmental overlay zone transition areas and riparian corridors, and for replacing the watershed functions provided by nuisance tree species when they are removed.</i></p> <p><i>The current environmental zone regulations that apply in the Columbia South Shore Plan District restrict removal of trees and other vegetation within both the transition area and resource area (with the exception of vegetation on the Nuisance Plants List). Therefore, no amendment to that chapter is necessary to address that issue.</i></p> <p><i>The proposal establishes a basic minimum requirement that non-development related tree removal in plan districts and overlay zones must obtain a tree removal permit. Replacement with at least one tree would be required. All trees planted in the environmental and other resource overlay zones must be native species identified in the Portland Plant List.</i></p> <p><i>Staff also acknowledges the interest in establishing a less cumbersome process for managing large land areas as an alternative to the existing NRMP process. Addressing this issue through development of an Environmental Master Plan process may be beyond the scope of the Citywide Tree Project, however, staff will determine whether this is possible to accomplish for inclusion in the revised draft for City Council consideration.</i></p>
<p>Proposed Code: 33.430.080 (7-b) Items Exempt From These Regulations: <i>“Dead, diseased, or dangerous trees or portions of trees when they pose an immediate danger, as determined by the City Forester or an arborist.”</i> Comment: <i>It needs to be determined what type of approval is needed for removal of these trees, or if only having an arborist report available, if needed, is sufficient.</i> <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p> <p>Response: <i>This code section lists activities that are exempt from the environmental zone regulations. Removal of trees that are dead, diseased or dangerous continues to be exempt from environmental zone regulations under the proposal. Title 11 would, however, require a tree removal permit and tree-for-tree replacement of all trees 6” diameter and larger in environmental zones and other resource areas (scenic, greenway, etc). This would include removal of dead, diseased and dangerous trees. The permit review would include confirmation of tree condition prior to issuance of a permit to remove the tree. A provision for emergency removals and retroactive permits is also included in Title 11.</i></p>

<p>Proposed Code: 33.430.130 (B-5) Permit Application Requirements: “A Tree Plan, meeting the requirements of Title 11, Section 11.600.050, must be provided. The plan must indicate trees proposed to be retained, trees to be removed, location and methods of tree protection, and quantity of small, medium and large size trees to be planted; and..” Comment: As indicated in II-3 above, the extent of a tree plan requirement is not established. Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</p>
<p>Response: The reference to the Title 11 Tree Plan requirement is provided here primarily for convenience of the applicant. It is intended to highlight that one plan can be provided to comply with both Title 11 and e-zone tree requirements. The information currently required to show that e-zone standards are met will, in most cases, be more extensive than what would be required to meet Title 11 requirements.</p>
<p>Proposed Code: 33.430.150 (E) Standards for Utility Lines and 33.430.180 (B) Standards for Stormwater Outfalls: “Native trees more than 10 inches in diameter may not be removed.” Comment: Since the tree replacement code has been refined, we feel the limit on tree size should be increased (to at least 18”) if the replacement requirement is met. The ability to relocate/replace utility lines is not always possible due to grade and other issues, and sometimes there are situations where removal of one larger tree could result in preserving a larger grove of smaller (i.e., under 10”) trees. Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</p>
<p>Response: The standards for utility lines and outfalls provide a limited allowance for tree removal and replacement without triggering environmental review. In the situation where larger native trees are removed, an environmental review would be required to evaluate alternatives and determine the option with the least detrimental impact. In that case, the decision to remove a larger tree to save a grove of smaller trees could be made. There is no discretion to review alternatives and associated impacts when standards are met. Staff feels that the recommended 18” tree size threshold is too large, but will recommend an increase from 10” to 12”. This will provide more flexibility for the applicant and will be more consistent with other tree size thresholds that apply in various situations.</p>
<p>Proposed Code: 33.430.175 Standards for Right-of-Way Improvements: “Trees within the right of way may be removed within the improvement area and within 10 feet of the edge of the right-of-way improvement. In no case may the combined total diameter of all the 6-inch and larger greater native trees cut exceed 225 inches.” Comment: The threshold of 225” is arbitrary, and has no relationship to the size of the site. In addition, most frequently, the requirement for right-of-way improvements is established by the City, placing the applicant in a difficult position. Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</p>
<p>Response: The standards for right-of-way improvements were established in the 2005 Environmental Code Improvement Project. They were intended to allow small right-of-way improvements to occur without triggering environmental review. The 225 inch threshold for rights of way was established at that time and is consistent with the previously existing development standard for tree removal in environmental zones. It was intended that larger right-of-way improvements with significant tree removal should go through environmental review in order to evaluate alternatives and associated impacts.</p>
<p>Proposed Code: 33.430.240 (1-b) Supplemental Application Requirements: “The existing conditions site plan must show the following for the entire site: b. Tree crown cover outline and generalized species composition, or trees 6-inches and larger identified by species.” Comment: Tree crown is very difficult and costly to identify, particularly on large sites with a large number of trees and no limit on which portion of the site must be inventoried. Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</p>
<p>Response: The requirement to show tree crown cover in areas that will remain undisturbed is an existing requirement. Since existing trees are part of the existing conditions, this information is proposed to be required on the “existing conditions” site plan, instead of the “proposed development” site plan. Showing tree crown should usually be much less costly than a tree by tree survey for large sites with many trees, since only the outline of the canopy needs to be shown (typically identified from an aerial photo).</p>
<p>Proposed Code: Chapter 33.440-Greenway Overlay Zones. Comment: We are not clear what the relationship is between proposed code changes in Greenway Overlay Zone and regulatory measures proposed with the River Plan project. It is unclear if the proposed code language for these two code projects has been reviewed to ensure the codes do not conflict. Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</p>
<p>Response: The new regulations proposed under the River Plan will apply within the North Reach, replacing the current greenway overlay zone regulations (33.440) in those areas. Therefore, conflicts are not anticipated. Staff will review the River Plan/North Reach code against the Citywide Tree Project proposal and may propose additional revisions to one or both code sets if needed to address conflicts or undue inconsistencies.</p>

I.F. Public and Capital Improvement Projects

Street Related Removal Mitigation Reduction Options

“City bureaus have discussed minimizing mitigation for trees removed when the City requires a builder to make a street improvement. BES is supportive of an option to require tree-for-tree mitigation only in situations where trees are removed at City Engineer direction. Such a level of mitigation balances the costs and process burdens on a builder who is already providing an expensive public improvement for the City’s infrastructure needs. BES would not be supportive of a full exemption from tree mitigation for these projects.” *Dean Marriott, Bureau of Environmental Services (3/22/10)*

Response: Staff agrees that this approach would be more equitable and consistent with mitigation requirements proposed to apply in other situations. The Planning Commission and Urban Forestry Commission expressed preliminary support to revise the initial draft proposal to require tree-for-tree mitigation in conjunction with City-required street improvements.

Flexibility for Capital and Public Works Projects.

“BES appreciates BPS’ work to provide enhanced flexibility for City projects and programs that allows City agencies to work with the Urban Forester to address trees in a meaningful way. The flexibility of programmatic permits, alternative root protection methods, and flexibility in locations of mitigation plantings will allow BES to maximize the effectiveness of existing tree protection, mitigation and planting efforts.” *Dean Marriott, Bureau of Environmental Services (3/22/10)*

Response: Support for flexibility through programmatic permits, root protection methods, and location of mitigation plantings is duly noted.

**II. TREES IN NON-DEVELOPMENT SITUATIONS –
Planting, Pruning, Removal, Replacement, Permits**

II.A. City, Street, and Private Trees

Responsibility to apply for permits on City managed property

“The draft Title 11 contains a requirement that “Only the City staff assigned to manage or care for trees on City lands may submit an application to plant, prune or remove a City Tree” (11.300.030 B. 1. a.) The Water Bureau is concerned that there is no requirement for the owner of the land to provide permission for the care taker to apply...We think 11.300.030 B. 1. a. should be changed to state that the City Bureau responsible for the site may submit an application.” --- *Michael Stuhr, Chief Engineer, Portland Water Bureau (3/23/10)*

Response: Agreed – Staff will include this modification in the revised draft proposal.

	<p>Special provisions in the Wellhead Protection Area</p> <p>“The Water Bureau’s Columbia South Shore Wellfield Wellhead Protection Area has restrictions on tree planting that are not reflected in the draft Title 11. These restrictions are outlined in the 2008 Stormwater Manual; “Planting trees or deep rooted shrubs over the top of required polyethylene geomembrane liners is prohibited in the wellhead protection area to protect the liners from root damage. Water Bureau review is required to determine which requirements apply. In some instances, infiltration may be allowed.” The purpose of this is to protect the groundwater and prevent the migration of contaminants. The Water Bureau requests that exemptions to tree planting (and replacement) requirements be written into the code for these lined facilities within the Wellhead Protection Area. This Area is currently not outlined in the Zoning Code, but is defined in the Water Code (Chapter 21.35 Wellhead Protection).” --- <i>Michael Stuhr, Chief Engineer, Portland Water Bureau (3/23/10)</i></p> <p>Response: <i>Agreed – Staff will include these modifications in the revised draft proposal.</i></p>
	<p>Level of mitigation</p> <p>“if there is awareness, understanding, and ‘buy-in’ from property owners, then that goes even further toward helping the city achieve our tree canopy goals. For example, if we force someone to plant six trees on the back of their lot, and they only wanted one, they perceive the government as being unreasonable, and heavy-handed, AND it is likely that they will let most of the trees die to eventually get to what they wanted in the first place. People are much more likely to care for a tree they wanted on their property. We need to work with that positive motivation and encourage it through reasonable requirements and options.” --- <i>Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (3/22/10)</i></p> <p>“The requirements for tree replacement of non-street trees, when removal is not associated with development does not have any mechanism for crediting property owners for trees planted prior to tree removal. Property owners may have already planted trees in anticipation of a more mature tree reaching the end of its lifespan, leaving them without sufficient area to plant additional replacement trees. The \$600 fee in lieu of planting needs to be looked at carefully to make sure it is accurate justified and appropriate to both development and non-development situations. I suggest that the payment might be reduced in non-development situations since removal in these situations is not linked with an increase in impervious surface. In these economic times additional costs need to be well documented. The proposed system does allow for waivers and it is hoped that a system will be developed that prevents the permitting\replacement requirements from being overly burdensome to lower income residents.” <i>Margot Barnett (4/1/10)</i></p> <p>Response: <i>Agreed – mitigation and planting requirements should be reasonable. Staff will propose clearer criteria for the City Forester to consider in reducing or waiving required tree replacement, and will explicitly include reference to the amount of trees existing on the site. Staff will also explore options for the City Forester to consider financial hardship in determining whether required mitigation should be adjusted.</i></p>
	<p>Need for a Tree Removal Permit System</p> <p>“People like trees, and that's good. We want them to continue to like trees, and not be hesitant to plant them or preserve them because of the dread of dealing with a complex system of rules and reviews and the cost of permits. Also, it is very expensive to remove a large tree, so people generally do not remove them without a good reason.” -- <i>Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (3/22/10)</i></p> <p>“People suspect other property owners of cutting down trees needlessly, and have the perception that the city is losing a lot of large trees. You will hear a lot of passion and emotion about the perceived loss of large trees in the city, but there is an absence of data on how much we have actually lost, where, and why. Large trees may have been cut down for very good reasons, such as disease, or root damage to building foundations, or to build a new home, etc. The perceived problem may be larger than the actual problem.” <i>Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (3/22/10)</i></p> <p>“Currently, when someone purchases a home and a large, healthy tree on the lot is perceived as "a danger" or "a mess" they may cut it down. It is true that sometimes a tree in decline is a danger but sometimes the fear is irrational and the decision impacts many others in the neighborhood. That a tree sheds leaves should not be reason enough to eliminate it...Often homeowners are not the ones that cut down trees and they assume that professionals know the rules. Perhaps service providers should be required to ask homeowners if they have permits before removing trees.” <i>Robert Elan (4/12/10)</i></p>

<p>Response: <i>The proposed tree removal permit system is intended to be clearer and more consistent than the current system. It is not intended to be onerous, punitive, or to discourage people from planting trees. The system should not be time consuming or costly, but should provide a better system to encourage retention of healthy trees, ensure trees are replaced and allow tracking of tree removal and planting in Portland's watersheds. Staff is working to further simplify the proposal, ensure that the proposed permit system is as streamlined and cost-effective as possible, and provide opportunities to educate and engage with property owners.</i></p>
<p>Uniform Tree Removal Permit; Tree Size Threshold</p> <p>"BES agrees with the removal of the current single family exemption from tree cutting regulations. This reinforces that all properties are important in sustaining Portland ecosystems and the tree infrastructure asset." <i>Dean Marriott, Director, Bureau of Environmental Services (3/22/10)</i></p> <p>"BES has long advocated regulation down to a 6 inch size, but will support the 12 inch trigger size in the proposal. BES staff will continue to support the smaller tree size in the future since smaller trees are critical ecosystem assets. BES is not supportive of increasing in the trigger size to 20 inches or more. A large amount of the City's tree canopy would be unprotected by moving to the 20 inch from the 12 inch trigger. Many of the trees we plant today are smaller varieties and may never reach [maturity] without reasonable protection." <i>Dean Marriott, Director, Bureau of Environmental Services (3/22/10)</i></p> <p>"Please support stronger protections for trees on single, non-dividable, residential lots in non-development situations: The proposed new code calls requires a permit and mitigation (either planting of new trees or payment of a fee that goes toward planting trees elsewhere) for cutting trees over twelve inches in diameter on single family, non dividable lots in non-development situations. These parcels cover more than 25% of our urban landscape. Please support this provision and urge the commissioners to consider lowering the threshold to six inch diameter trees. It is critical that we all take responsibility for trees: Tree protections should be comprehensive across all land use types and for both development and non development related activities." --- <i>Michelle Bussard, Executive Director, Forest Park Conservancy (3/23/10)</i></p> <p>"We are encouraged by the proposed Citywide Tree Project objectives and new regulatory framework and offer the following comments. We believe that the new permit system, which will be applied to all lend uses and based on tree type, size, and condition, will allow for better protections of existing trees throughout the City." --- <i>Brian Lightcap, Chair West Multnomah Soil and Water Conservation District (3/18/10)</i></p> <p>"Trees in non-development situations: We could urge the Commissions to consider lowering the regulatory threshold for permitting tree removal in non-development down to six inches rather than the currently proposed 12 inches. We believe the 12" standard (6" for Madrone and White Oak) will allow for the unregulated and unmitigated loss of too many trees and is contrary to the city's objective of preserving and enhancing the urban tree canopy. 19% of the city's canopy currently falls in the 6"-12" range." --- <i>Bob Sallinger, Conservation Director Audubon Society of Portland; Jim Labbe, Urban Conservationist, Audubon Society of Portland; Mike Houck, Executive Director, Urban Greenspaces Institute; Ron Carley, Co-director, Coalition for a Livable Future; Jill Fuglister, Co-director, Coalition for a Livable Future (3/23/10)</i></p> <p>"Planting new trees is great, but trees that have already grown and reached their full potential in cleaning our air, providing habitat, mitigating urban stormwater, and their many other benefits, need special protection....The new code could also be improved if it provided stronger protections for trees on single, non-dividable, residential lots. A permit and mitigation should be required for trees six inches in diameter." --- <i>Dianne Ensign (3/22/10)</i></p> <p>"Please support stronger protections for trees on single, non-dividable, residential lots in non development situations: The proposed new code requires a permit and mitigation (either planting of new trees or payment of a fee that goes toward planting trees elsewhere) for cutting trees over twelve inches in diameter on single family, non dividable lots in non-development situations. These parcels cover more than 25% of our urban 1andscape.Please support this provision and urge the commissioners to consider lowering the threshold to six inch diameter trees. It is critical that we all take responsibility for trees: Tree protections should be comprehensive across all land use types and for both development and non development related activities." --- <i>Veronica Kelly (3/23/10)</i></p>

<p>"To be effective, any tree strategy must focus first and foremost on protecting our existing tree canopy. Please support stronger protections for trees on single, non-dividable, residential lots in non-development situations: The proposed new code calls requires a permit and mitigation (either planting of new trees or payment of a fee that goes toward planting trees elsewhere) for cutting trees over twelve inches in diameter on single family, non dividable lots in non-development situations. These parcels cover more than 25% of our urban landscape. Please support this provision and urge the commissioners to consider lowering the threshold to six inch diameter trees." --- <i>Nana Nash, M.A., Member of Audubon Society of Portland and Friends of Trees (3/23/10)</i></p>
<p>"We believe that the new permit system, which will be applied to all land uses and based on tree size and condition, will allow for better protections of existing trees throughout the City." <i>Terri Preeg Riggsby, Chair, Tryon Creek Watershed Council (3/22/10)</i></p>
<p>"We strongly support components of the new policy, including... -Standardized tree removal permit system; require a permit to remove trees 12 inches in diameter or larger on all lots; eliminate existing single family lot exemption [and] clarified use of City tree funds." <i>Nancy Seton, SWHRL Neighborhood Assn. Land Use Chair, Board Member (3/23/10)</i></p>
<p>"Overall, we do believe that a uniform application of regulations is needed to address multiple issues with regard to trees and overall support the Citywide Tree Project." <i>Scott Fogarty, Executive Director, Friends of Trees (4/13/10)</i></p>
<p>"The proposed standardized tree permit system will help provide an opportunity for public education regarding the value of urban trees, simplifies current code, and removes the inequities between how trees are regulated on residential properties. Streamlining of the appeals process in the new permitting system is a definite improvement...There might be some cost savings available if the simplest permits have an option for online processing, allowing submittal of pictures by the applicant...I am conflicted regarding the trigger size of 12 inches. Slower growing long-lived trees take many years to reach that size. I certainly would not support a 20-inch trigger." <i>Margot Barnett (4/1/10)</i></p>
<p>"Portland is becoming a more mature city with most building being redevelopment and infill. As such it is important that we be forward thinking and find ways to encourage the stewardship and growth of our urban forest on properties that are already developed in addition to preserving trees during the development processes." <i>Margot Barnett (4/1/10)</i></p>
<p>"I strongly suggest that the proposed regulation to require permits to remove healthy 12-inch or larger diameter trees on private property be changed to 6-inch diameter. Here's why: Depending on the species, 11 or even 7-inch diameter trees are substantial and may be well on their way to providing the mature, wide canopies essential to a healthy urban ecosystem...And as the older, huge trees (that would be protected under this regulation) die out, we would be left with very few large trees to take their place." <i>Eileen Stark, Biologist and landscape designer, Second Nature Garden Design (3/25/10)</i></p>
<p>"Please support stronger protections for trees on single, non-dividable, residential lots in non-development situations:... These parcels cover more than 25% of our urban landscape. Please support this provision and urge the commissioners to consider lowering the threshold to six inch diameter trees." <i>Judy Todd (4/1/10)</i></p>
<p>"I particularly urge you to: Require a permit with a neighborhood comment and review phase for the removal of any tree greater than 6" in diameter on public or private property. The current proposal of 12" is not adequate, as many existing trees may never survive the axe and get the chance to become large trees in this scenario." <i>Richard Weber (3/28/10)</i></p>
<p>"While I applaud the work done to refine, clarify, and consolidate the tree codes, I have a few specific concerns. Removal permits for trees over 12" is too large. I understand the problem of staffing site visits, but many trees; particularly the trees that mature to a smaller height, may take 10 years to get to that size. I recommend 8-10" because many seeded trees grow quickly to 4" and many ornamental trees take quite a while to get to large diameters. Nuisance trees should be exempt. Removal should have an emergency permit allowed with photos. Replanting should be allowed any time, but encouraged to be done in the wet months, instead of the 30 day timeframe. I encourage you to consider requiring businesses that get licensed for tree work in the city to have certified arborists on every job site. The ISA has a widely accepted program for certification. There are many trees in the city that are under protection of tree preservation but few arborists or homeowners know if the tree they are working on is on a plan. There needs to be an easy way to access this database if you want compliance. Perhaps putting it on Portlandmaps.com?" <i>Jim Wentworth-Plato, BCMA (Board Certified Master Arborist), Emerald Tree (3/24/10)</i></p>

"I strongly support a new, improved, and stronger plan for Portland's trees. I strongly support regulations that would require a permit for removing trees 12 inches or larger in diameter on private property regardless of the lot's location or size. In just the last two years I have witnessed 4-5 large trees removed in my neighborhood alone." *Christine Colasurdo (4/13/10)*

John O'Shea said proposals need improvement and have not received enough public input. He stressed 1) proposals are well-intentioned, but consulting arborists have been left out of the discussion; 2) a 1:1 ratio or fee schedule is punitive and not relevant to the fast growth rate of trees in the Pacific Northwest; and 3) proposals don't take into account arborists' getting paid for securing permits or the number of times arborists need to remove trees for good reasons. In response to questions, he said it is difficult for arborists to bill for time not connected to work on trees. He referred to Lake Oswego's requirement for an arborist to remove hazardous trees as a good model. *John O'Shea Consulting Arborist, LLC, Excerpt from (4/13/10) Joint Planning and Urban Forestry Commission Minutes*

Lisa Tadewaldt stressed the need to streamline the permitting process for removal of hazardous trees. She said it currently can take two weeks to get a permit in Portland because of the requirements for documentation, but most hazards relate to situations that have already occurred such as trees that have fallen on a house or in the street, or are unstable or breaking. In response to questions, she said submitting pictures or using certifications according to an ISA Code of Ethics would work in most cases. She recommended Lake Oswego's permit system that allows reporting after the fact as a model. *Lisa Tadewaldt, Urban Forest Pro, LLC, Excerpt from (4/13/10) Joint Planning and Urban Forestry Commission Minutes*

Jeff Moore questioned how the project could be funded given the volume of permits that would be required. He said his crew cuts down 20-50 trees a week in Portland, and there are 170 tree services in Portland. In response to questions about the condition of trees that he cuts, he described cutting 180 trees on the levee, most of which needed cutting due to their condition. He described bad trees as multi-stem, rotten trees that crowd homes or could potentially fall on them. He said some people cut trees because they are messy or they want more sunlight. *Jeff Moore, Urban Forest Pro, LLC, Excerpt from (4/13/10) Joint Planning and Urban Forestry Commission Minutes*

Response: *Support for uniform tree removal permit and elimination of the existing single family exemption is duly noted, along with concerns from some regarding the reaction of homeowners to expanded permit requirements.*

Staff recognizes that there is an interest in reducing the tree size threshold from 12" to 6" in diameter. Staff believes that it is appropriate to retain the existing 12" diameter tree size threshold for private tree permits as the City shifts to a more standard approach that applies citywide. The 12" diameter tree size is understandable and enforceable. Reducing the size threshold from 12" to 6" would be costly, difficult to enforce, and could be perceived as more intrusive and burdensome by the public.

The Planning Commission and Urban Forestry Commission expressed preliminary support for retaining the 12" diameter threshold, though some expressed support for a 6" diameter threshold if the permit system could rely more on an "honor system" for compliance. The Planning Commission gave preliminary endorsement to a simplified uniform permit approach, with cautions to make the process simple and non-intrusive for homeowners.

Members of the Urban Forestry Commission expressed concern regarding the proposal to expand the tree removal permit system to apply to homeowners. Staff is continuing to develop streamlined measures for homeowners, and anticipates proposing homeowner-specific provisions in the next draft proposal. Such provisions could include a "call before you cut" approach for smaller trees and a permit with a simple tree-for-tree replacement requirement for larger trees.

	<p>Pruning Permits for Street Trees</p> <p>“The idea that I would have to get a permit to trim trees in the sidewalk strip of my property is repugnant. There are no trees in the strip at present and it has been my desire to plant some trees here. I like the general objectives of the initiative, particularly increasing the canopy cover, but no way am I going to plant trees where I will be subject to City oversight of when and how I prune them and the attendant fees and inspections. The proposed regulations take the model of building and zoning codes into an area where there is no compelling public good to secure – worthy objectives yes but threat to life safety, not really. The concepts and development of this Code is obviously the product of a bureaucracy not the citizenry. It appears very likely to be costly, burdensome and ineffective at securing some the primary objectives, particularly increasing the canopy on private land (including sidewalk strips). I urge the adoption of a far lighter hand, more like the friends of trees program and less like the Portland tree police less you compel us away from an arboreous prospect.” <i>Jim Wilson (6/11/10, after close of Planning Commission record on 6/8/10)</i></p>
	<p>Response: <i>The requirement to obtain a permit to prune trees in the street rights of way (i.e. Street Trees) is a current requirement that has been in place since the original public tree ordinance was adopted in the early 1970's. The purpose behind these cost-free permits is to ensure that owners have the knowledge (or have hired contractors with the knowledge) of proper pruning methods. The City Forester is concerned with excessive pruning of these trees and topping, which impact the aesthetic beauty of the trees as well as the health, longevity and safety of the street trees. The current proposal carries the existing permit requirement forward, but for the first time provides a legal means to conduct very minor pruning without the need for a permit (i.e. removal of sucker shoots from the base of trees, and pruning branches up to 1/4 inch, the typical size that hand pruners can cut). This acknowledges property owners' need to maintain their street trees for required clearances and better tree health, while responding to the City Forester's concerns about excessive pruning.</i></p>
	<p>Minimum tree size threshold for regulating Street Trees and City Trees</p> <p>“The Water Bureau requests that the Bureau of Planning and Sustainability be directed to set a minimum regulated tree size of 3” diameter at breast height (dbh) for City and Street Trees. The current draft statement that “The regulations of this chapter apply to all trees in the City of Portland that are on lands owned by the City...” (11.400.020) will be impossible to enforce and very costly for the Water Bureau. By having no size threshold, even the smallest seedling is regulated, making simple acts such as mowing a lawn or pulling weeds from a green roof at a City facility subject to the permitting requirements of this chapter. The costs and potential project delays associated with identification, consultation, protection, public notification, obtaining a permit to maintain/remove, and replacement greatly outweighs the benefits derived from regulating small diameter brushy vegetation that is of limited value and could be expected to grow back quickly without replacement.” <i>Michael Stuhr, Chief Engineer, Portland Water Bureau (3/23/10)</i></p> <p>Response: <i>Agreed – The Planning Commission and Urban Forestry Commission have expressed preliminary support for establishing a 3” diameter minimum size threshold for regulation of Street Trees and City Trees in the revised draft. Like landscaping requirements, smaller sized trees that are newly planted would be required to be maintained and replaced as necessary until they reached the size where tree permits are required.</i></p>
	<p>Public Appeals and other Tree Permit Cost Factors</p> <p>“The Water Bureau has concerns with the public appeal procedure for Type C permits outlined in 11.300.060.D. Removal of a large, healthy tree will only be approved by the Forester in circumstances where absolutely necessary in order to provide essential services. A lengthy appeal process could be initiated by members of the public would only cause delay and increase the cost of providing water to our customers.” <i>Michael Stuhr, Chief Engineer, Portland Water Bureau (3/23/10)</i></p>

<p>“The proposed code offers the public the right to appeal tree cutting of healthy trees greater than 20" in diameter or slow growing natives greater than 6" in diameter in non-development situations. These code provisions are very confusing, increasing code complexity by creating a separate permit and process (Type C), without providing a clear public benefit. There are several issues with this section which should be addressed: The provision applies only to non-development situations. If the intend is to provide the pubic with the right to appeal removal of large trees than it should be equally applied to development situations where most of the healthy large trees are being removed; The criteria for issuing and/or appealing a permit are unclear and thus nearly impossible to adequately implement...; The appeal can be brought by any public, even those outside the City of Portland, without a specific interest or concern with the neighborhood...In non-development situations, the three different permit types, coupled with appeal rights, and different mitigation standards will be a challenge for staff to effectively communicate. Staff fears that a high level of complexity will contribute to higher levels of non-compliance because of a lack of public understanding and acceptance. In reviewing this draft, staff hopes that Commissioners try to keep in mind the goal of this section of the code which is to compensate for tree cutting by requiring mitigation by which our future urban forest can be maintained. Much of these regulations can be removed while still retaining the strength of the intent and its application. Procedural overhead should be kept to a minimum with the focus placed on providing adequate funding for the professionals working in the field...Staff feels that the code can be more tightly written and thus briefer if much of the procedural information is codified through administrative rules. Procedures are subject to change and therefore should be easily amended rather than, as drafted, only through Council action.” <i>David McAllister, City Forester, Portland Parks and Recreation (4/12/10)</i></p>
<p>“While I appreciate the educational value of face-to-face interaction with individuals/businesses seeking tree permits, I am concerned that the volume of such interactions could be overwhelming. Some of these contacts could/should be handled on-line. You might be surprised at how often citizens turn to on-line sources for information.” <i>Linda Robinson (4/13/10)</i></p>
<p>“We also applaud the City’s efforts to keep the tree cutting permit process from adding undo time and expense for residents, developers, and those wanting to expand existing businesses. We wish to add that the costs of under the code should be reasonable and affordable for city residents.” <i>Jane A. Van Dyke, Executive Director, Columbia Slough Watershed Council (4/9/10)</i></p>
<p>“Implementation costs for comprehensive City inspections. Urban Forestry (UF) inspection of every tree site is expensive and is likely to duplicate contractor and arborist services already required and available for property owners. UF’s expertise should be reserved for the most important and technically complicated cases. The City should establish a program of landscape contractors certifying code compliance on the simplest permits, arborists certify the next tier, and Urban Forestry reviews of the largest/most sensitive trees and all appeals. UF spot checking would guarantee the validity of professional certifications.” <i>BES Tree Code Option, Bureau of Environmental Services (4/27/10)</i></p>
<p>Response: <i>The initial draft proposal included recommendations to streamline and standardize permit appeals processes by formalizing an appeals board, and limiting public appeals to larger (20"+) trees. The project also sought to bring parity between the public’s current ability to appeal private tree removals and the lack of ability for the public to appeal public tree removals.</i></p> <p><i>In response to direction from the Urban Forestry and Planning Commissions, staff is developing a simpler, two tiered permit system consisting of simple “confirmation” permits, with minimal process, inspections, and appeals, and “review” permits which would require an inspection, evaluation of approval criteria, and an opportunity for public appeals. In general, the review permits are for removal of healthy 20”and greater trees, and requests to remove multiple healthy trees (5 or more per year).</i></p>

Proposed Code: Chapter 11.300 Permit Procedures

Comment: We are very concerned about the additional cost and time associated with obtaining permits for the numerous development projects, as well as the on-going maintenance that occurs on Port property. We strongly recommend a streamlined permit process be established for large property owners such as the Port. This streamline permit process could be similar to the City's popular Facilities Permit Program, and could allow those property owners to apply under a separate streamlined review process (and private utility providers, etc.), particularly those who include trained staff and face on-going tree-related issues. Possibly, this streamlined facility-type permit could be addressed through an expanded "programmatic permit" as provided in Section 11.300.070 for public agencies. We are also very concerned that the timeline for a decision for Type A, B, and C permits is not specified. The commentary in this section indicates, "...the implementing Bureaus have expressed concern having these timelines in code," yet appeals of such decisions must be filed within 14 days. It is not sufficient to indicate in the commentary, for example, that "Type A permits are intended to be processed quickly..." As indicated above, it is not clear what measures are in place to ensure the three bureaus involved in tree reviews can actually process simple permits in a timely manner. Lastly, it is also unclear how current agreements with the City regarding special planting standards in/near the airport will be affected by this proposed code." *Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)*

Response: *Regarding the concern about additional time and cost for separate tree permits through the development process: The proposal does not add a requirement to obtain a separate tree permit for development permit applications. The preservation and tree density standards would be reviewed concurrent with the building permit process.*

Regarding the need to specify timelines for review of tree permits: We heard similar concerns from arborists in regard to processing tree permit applications in a timely fashion. Initially, the code specified timelines, but these were removed due to concerns raised by the implementing bureaus. The bureaus concerns are based on the uncertainty of staffing levels to process permit applications. Codifying the timelines obligates the city to make its decision within a set time period or risk a claim. Staff will recommend that the City Council direct Urban Forestry to develop administrative rules to accompany the code for this sort of procedural guidance. Staff has included provisions to allow for emergency tree removals when imminent hazards are present with a retroactive permit application process. In addition, revisions to the tree permit system noted above are intended to eliminate a number of required inspections by relying on certified professional assessments and documentation from applicants where feasible. This should expedite many of the typical permit requests received.

Regarding comments on the Programmatic Permit: Ongoing maintenance for public agencies may be accomplished through obtaining a programmatic permit. This permit would establish the range of allowed maintenance activities, any required notification procedures (tailored to the type of work being performed), and replacement requirements on a long-term time scale (up to 5 years). Proposed revisions endorsed by the Planning Commission/Urban Forestry Commission process would limit activities allowed through this permit to routine maintenance activities. Removal of healthy non-nuisance species trees more than 6 inches in diameter would not be allowed under this permit. (Note: Planning Commission endorsed a 12" diameter size threshold, however the Urban Forestry Commission recommended the 6" threshold.) Permittees would need to submit an annual activity report to the City Forester for review to ensure compliance. Applicants would have the ability to appeal decisions of the City Forester to the Urban Forestry Appeals Board. The programmatic permit is not intended to address specific development projects, as these would be reviewed like any other development permit application.

We acknowledge the agreements the Port has made regarding the planting requirements for the Zoning Code. Staff intends that the landscaping standards to be adopted as part of the Airport Futures project would apply to PDX, as would the proposed Tree Preservation standards. The proposed Tree Density standards would not apply (the terminal is not within the listed development types for tree density). However, other development within the plan district (such as retail, warehouse, or freight movement) would be subject to both the Tree Preservation and Tree Density standards. If unable to accommodate planting trees on site, then payment in lieu of on-site planting would still be an available option.

	<p>Desired Future Condition</p> <p>“There are areas of the City where dense forest is not the ideal future condition. Competing interests of solar access, wellhead protection, maintenance of clear utility corridors, or support of non-forested habitat (meadows, for example) are not considered adequately in the draft Title 11...The Water Bureau requests ... a procedure for establishing an alternative “Desired Future Condition” for specific sites where dense forest is not appropriate. These sites would then need to be exempt from the tree density and replacement requirements in both development and non-development situations.” - <i>Michael Stuhr, Chief Engineer, Portland Water Bureau (3/23/10)</i></p> <p>Response: <i>Under the proposal public agencies could establish goals for desired future condition and deviate from normal replanting requirements through the establishment of a Programmatic Permit. Staff is also recommending that the revised draft include a new Tree Management Permit option to address longer term tree management objectives on large sites such as agency property, open space uses, and institutional uses.</i></p>
	<p>Street Tree Planting; Fruit and Nut Trees</p> <p>“I would like to comment that we'd like to see more trees in Goose Hollow. The flat parts of our neighborhood (E/W is I-405 to SW 18th and N/S is from Burnside to the low slopes of the West Hills) are barren places, where the overwhelming feeling is of a concrete wasteland. Simply adding more street trees would add a warmth and greenness to a neighborhood that really needs it!” - <i>Tracy Prince (3/17/10)</i></p> <p>“I would like to see the city of Portland designate certain areas to plant fruit trees between the street & the sidewalk. I realize there would be some mess to clean up after people helped themselves to the ripe fruit and some rotten fruit would be left. Perhaps this project could be undertaken in connection with neighborhood groups who would "adopt" a street to take care of.” - <i>Judith Bentley (3/16/10)</i></p> <p>Response: <i>An interest in more street trees in Goose Hollow, and in the designation of priority areas for fruit and nut street trees, are duly noted. The draft proposal recommends that the City establish policies to promote the planting of fruit and nut trees through the Portland Plan project. Staff will also forward this comment to the City's Food Policy Coordinator.</i></p>
	<p>Extend Federal Exemption</p> <p>“Title 11 exempts State and Federal authorities who manage property. Since the levee system is a federal levee system being managed for public safety, and any trees being removed are required to be removed by a federal agency, why wouldn't the District fall into the same category? We recommend inserting the language being offered in the Port of Portland ESEE into [Title] 11.” --- <i>Dick Shafer, President of the Peninsula Drainage District #2 (3/23/10)</i></p> <p>“While the proposed code language acknowledges federal requirements related to trees growing near and on flood control levees, it does not acknowledge federal and state requirements related to trees growing into the flight path (airport surfaces) around Portland International Airport (PDX). Specifically, the Federal Aviation Administration (FAA) regulates trees around airports under its Part 77 (protected surfaces) and Part 139 (wildlife hazard) requirements. In addition, the State Airport Planning Rule (OAR 660-013-0010) directs cities to prohibit trees from growing into airport surfaces. As a result, the proposed code language should be amended to reflect these federal and state requirements.” <i>Tom Bouillion, Planning Manager, Marine & Industrial Development, Port of Portland (4/13/10)</i></p> <p>Response: <i>Title 11 makes it explicit that the rules do not apply to state or federal authorities, since in most cases the city does not have the authority to regulate these properties. Special districts, counties, and other agencies are not subject to the same rules of preemption. However, the code does recognize federal and state mandates as applied to these agencies: when subject to a specific order, the requirements of Title 11 do not apply. Recognizing the FAA mandates, we will be amending the description of prohibited topping to exclude height reduction performed to meet FAA mandated clear air space limits.</i></p>

	<p>“Grandfathered” activities; parties responsible for preventing violations</p> <p>“Proposed code language suggests that the property owner as well as a party cutting or pruning trees without a permit would be in violation and subject to City penalties. This situation may be a problem for the Port and other property owners...when the easement specifically allows the utility to clear vegetation, including trees. These easement holders, including the Bonneville Power Administration (BPA), a federal agency, may not feel compelled to obtain a programmatic tree cutting permit from the City, since it may be considered a nonconforming or "grandfathered" activity. In other words, the Port does not want to be held responsible for actions taken by easement holders on Port property, since the Port must legally respect the rights of the easement holder.” <i>Tom Bouillion, Planning Manager, Marine & Industrial Development, Port of Portland (4/13/10)</i></p> <p>Response: <i>The enforcement provisions are intended give flexibility to pursue the party or parties responsible for the violation. In some cases, the contractor or person conducting the work may be acting on the presumption that the property owner has obtained proper authorization, in which case the property owner is ultimately responsible. In other cases, the contractor may represent that they have obtained or do not require authorization to conduct particular work. In these cases, the city is more inclined to pursue the contractor. Each case would be investigated and acted on accordingly.</i></p>
	<p>Trees and Solar; Trees and Views</p> <p>“Solar and Trees...nothing has been addressed as to what the policy’s impact may have on solar as solar continues to make greater strides in the market place.” --- <i>Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</i></p> <p>“View Easements. There is nothing addressing view easements...Most view easements require trees to be topped or removed, not just ‘thinned’. How are these easements...going to interact with the new policy regulations?” --- <i>Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</i></p> <p>Response: <i>The proposal is intended to provide sufficient flexibility to address the installation of current and future solar system, while also encouraging the retention of healthy trees where practical. This flexibility is provided both in the proposed tree preservation and tree density standards that would apply in development situations, and when considering applications for permits to remove trees in non-development situations. Where trees would block a solar system on the same property, the City could approve removal of the tree with mitigation. For larger healthy trees, the proposal provides an opportunity for the City to consult with property owners to see if it is practical to meet both objectives without removing the tree. In addition the proposal would establish a new permit to allow limited pruning in environmental overlay zones without a land use review. This permit could help a property owner increase light and solar access on his/her property. The Planning Commission and Urban Forestry Commission have expressed preliminary support for establishing this new permit option. The City does not enforce private easements (or other private deed restrictions). Any tree removal or pruning needed to comply with private view easements would need to be carried out in a manner that complies with City regulations, meaning appropriate permits (and mitigation) would need to be obtained. The fact that a pre-existing view easement is in place could be a factor considered in the tree permit review.</i></p>
<p>II.B. Pruning Permit in Environmental Zones</p>	
	<p>Proposed Code: 33.430.080 (8) Items Exempt From These Regulations: <i>“Pruning trees, when conducted under an approved tree pruning permit as required by Title 11, Trees...”</i>Comment: <i>We are concerned about the cost, delays, and unnecessary review required for a tree pruning permit for any pruning. Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i> <i>(same comment regarding E-zone regulations in CS/PIC Plan District and Columbia South Shore Plan District)</i></p>

"The current draft of Title 11 allows for much more pruning on trees in preservation zones than Title 33. Looking at the issue through a fire safety lens, this is a good thing; the further a tree is from a burning structure, the less likely the fire will spread from the structure, to the tree, and to surrounding trees. Requiring that the pruning be done under permit provides the necessary balance between tree preservation and competing interests that could provide rationalizations to denude the City. What Title 33 has, but this draft of Title 11 does not, is any allowance for permit exempt fire safety measures...33.430.080 contains fire safety provisions; it allows pruning of trees and shrubs within 10 feet of structures, and removing of branches on conifers within 30 feet of structures to a level of 6 feet from the ground when within the City's wildfire hazard zone; all without a permit. These wildfire mitigation measures are but a fraction of what national standards call for, but it is something. If the current Title 11 draft comes into effect, the Title 33 language goes away and all pruning will have to be by permit. This sets fire safety back to where it was prior to 2006, when the current fire safety exemptions were approved. It puts the citizen in the odd position of having to go through a regulatory process to garner permission to even minimally protect their home. Further, it puts the City worker in the odd position of having to explain why this is appropriate. It's a tough position to defend. Therefore, Fire requests that the pruning allowance in 33.430.080 be carried forward into Title 11." *Richard Haney, Assistant Fire Marshal, Portland Fire & Rescue (5/25/10)*

Response: *This provision would provide additional flexibility for property owners within environmental zones -- flexibility that does not exist under the current regulations. Today, except for very limited exemptions, pruning native trees within environmental resource areas requires environmental review. The proposal would allow pruning to occur under the oversight of an arborist, subject to issuance of a Title 11 permit. Establishing this option would greatly reduce cost and review time for the applicant. Current exemptions that allow pruning for trees located close to buildings and removal of low-hanging branches are intended to be exempt from the Title 11 permit requirements. Staff acknowledges that not all of those exemptions were included in Title 11 and intends to correct that error in the next code draft.*

II.C. Programmatic Permit

"The Programmatic Permit contains a requirement to notify the public prior to performing permitted activities. The Water Bureau requests that 11.300.070 C. 6. be changed to state that the outreach and notification program include a description of measures to inform the public of specified types of upcoming permitted activities. For all routine activities associated with maintenance work, the public notification process for obtaining the Programmatic Permit should suffice. Public notification of each individual action under the Programmatic Permit would be costly and infeasible." --- *Michael Stuhr, Chief Engineer, Portland Water Bureau (3/23/10)*

"We are concerned about the level of notice and comment allowed for the programmatic permits. We believe that programmatic permits have the potential to have significant impacts on the urban canopy, and that different agencies have demonstrated differing levels of expertise and concern for protecting and preserving trees. We would urge the Commissions to recommend a greater level of public review including an opportunity for appeal and regular reviews of implementation of the permit within the 5-year lifespan." --- *Bob Sallinger, Conservation Director Audubon Society of Portland; Jim Labbe, Urban Conservationist, Audubon Society of Portland; Mike Houck, Executive Director, Urban Greenspaces Institute; Ron Carley, Co-director, Coalition for a Livable Future; Jill Fuglister, Co-director, Coalition for a Livable Future (3/23/10)*

<p>“Each day of the year, District staff is in the natural resource doing routine maintenance. There have been five-year renewable permits secured to do this federal and state-mandated maintenance work without seeking individual permits. An annual report created by the District explains what has been done during the past year and what is planned for the upcoming year. The regulatory staff may come to look at any project at any time. The process is very transparent and has worked well. The Districts are not in the tree removal business. It would be great if we didn't have to remove trees, allocate funds for tree removal or work with neighborhoods to remove trees. Our mission is personal and property safety through a highly rated flood-control system. However, when the United States Army Corps of Engineers says a tree violates its national levee vegetation standard and must be removed to keep the levee certification, we must remove the tree. That tree is either a dead, dying or diseased tree, or it is a hazard tree by federal definition. The USACE has overlooked some of these trees in years past, but now, because of the new standards brought about by the levee failure experience in New Orleans during Hurricane Katrina, requires they be removed. The majority of these trees were not planted to be part of the levee landscape. They grew from seeds distributed by the winds or buds and should not have been there in the first place. We have asked City staff to note these federal mandates in the language of the new [Title] 11 and help keep the districts from getting caught between a federal mandate and local regulations. The District's support the Programmatic Agreement approach which is identified in [Title] 11. However, because we also perform other activities in the environmental resource areas, [Title] 33 would still apply but does not have provisions for a Programmatic Permit approach. We, therefore, recommend a code amendment to Chapter 33 to allow for the Programmatic Permit approach. We've heard that some object to the Programmatic Approach because there is no appeal process built into it. If this is an issue, we support an appeal process being put into place.” --- <i>Dick Shafer, President of the Peninsula Drainage District #2 (3/23/10)</i></p>
<p>“The programmatic permit system makes sense, as long as a provision for appeal is put in for situations that meet a certain threshold of number of trees to be cut in a particular project. This is of particular concern when looking at the potential large scale cutting of trees by entities such as the Port of Portland, and Drainage Districts and City Bureaus.” <i>Margot Barnett (4/1/10)</i></p>
<p>“While a programmatic permit approach sounds promising, it is unclear what mitigation or other obligations might stem from such an approach. What will the fiscal and operational impacts be to the Port, city bureaus such as Maintenance and Transportation, and public utilities as they undertake routine pruning and removal of trees?” <i>Tom Bouillion, Planning Manager, Marine & Industrial Development, Port of Portland (4/13/10)</i></p>
<p>“Riverside is comprised of 160 acres and has an estimated 1000 trees. The fundamental use of the course requires that we employ skilled staff to steward these resources for the enjoyment of our customers. We are all proud of the work we do with trees and the many other plants we manage...the draft envisions a Programmatic Permit for governments and utilities in Chapter 11.300.070. We believe such a similar mechanism might be appropriate for our situation. Our initial conversations with staff have conceived of a Tree Management/Maintenance Plan that would be adopted for a multi-year period, subject to periodic reviews and renewals. Such a Plan could incorporate the operating practices and standards of the many facets of golf course operations while ensuring that tree management practices meet the goals of this program. This would streamline the process for a large area and still comply with the intent of the program. It may also be possible to integrate this effort with the Airport Futures Environmental Code updates.” <i>John Loff, Golf Course Superintendent, Riverside Golf and Country Club (4/13/10)</i></p>
<p>“Section 11.300.070 which addresses programmatic permits is currently implemented by Urban Forestry to efficiently and effectively address large tree care and maintenance issues. The narrative states "these programmatic permits are for more routine and customary maintenance practices". If this is the case, staff is not sure why the proposed section of the code adds significant process without any clear affect to the permit or the public. Staff encourages code where it meets the intent helping reach City canopy goals. This whole section could be removed without jeopardizing this objective.” <i>David McAllister, City Forester, Portland Parks and Recreation (4/12/10)</i></p>

"Trees within and surrounding CECC are important to the visual quality and functionality of our property as a golf course. We employ skilled professionals to maintain these trees and many other plant types to ensure that the CECC continues to reflect a high quality environment. With that said, we frequently assess the trees on site as part of our ongoing maintenance and prune, remove, relocate and replant trees that may present safety concerns, are needed to assist with the health of the tree. Temporary and permanent course modifications and the addition of accessory structures (i.e. concessions, restrooms, etc) may also result in the relocation of trees and other vegetation.

Based on our initial review of the proposed code language released in February 2010, we were quite surprised and concerned with the significant amount of new and complex code as it could possibly be interpreted to relate to our current operations and maintenance practices. As an example, this code is so ambiguous, extensive and complex, it is possible that we could be required to hire consultants anytime we need to accomplish only the simplest of pruning or work within root/canopy area. In addition, permit review as proposed will result in additional time and cost that could become financially devastating in these difficult economic times, and create potential safety and liability issues. We strongly recommend that this permit process include more exemptions for normal maintenance and operations. If some review is required, the city should include a streamlined permit process for large property owners such as the CECC. We understand the current proposal includes some form of 'programmatic permit' as provided in Section 11.300.070 for large public agencies...we strongly urge you to reconsider adopting these overreaching regulations as currently proposed and encourage the concept of a programmatic permit process for large sites such as CECC." *Brian Leitgeb, Columbia Edgewater Country Club President (5/10/10)*

"...I would point out to the Commission...the importance of developing some sort of system that supports the stewardship of trees on commonly owned areas through a special type of programmatic permits or some method tailored to these areas...This because any astute observer must clearly recognize that the use of common areas permitting clustering offers the best opportunity to protect trees as well as other environmental features in many private ownership situations. I believe that in many ways they are very much like and on the same scale as many institutional operations such as churches or the assisted living facility I referenced earlier and that the community would benefit from approach that supports these types of uses and ownerships making good tree decisions." *John Gibbon (6/8/10)*

"Fire has worked closely with Parks over that past few years to adopt future desired vegetation conditions in Oaks Bottom, Powell Nature Park, and Forrest Park that will help reduce the chance of catastrophic fire conditions on those properties. The programmatic permit outlined in 11.300 will be a great help in implementing these plans." *Richard Haney, Assistant Fire Marshal, Portland Fire & Rescue (5/25/10)*

Response: Staff recognizes and appreciates the mix of support, interest and concern regarding the proposed Programmatic Permit. The intent is to establish a permitting mechanism that promotes efficient public agency routine operation and maintenance activities that would otherwise require multiple tree permits. Equally important, the Programmatic Permit is intended to encourage stewardship, provide transparency, and ensure a net benefit to the urban forest. The Programmatic Permit also provides a tool to customize tree related activities, including tree replacement, to most reasonably meet these goals. For example, an agency that conducts routine removal of nuisance plant and tree species, along with extensive native plantings in local watersheds, may be authorized to conduct such activities without a strict “tree for tree replacement” at the project sites.

Taking the mix of comments into consideration, staff is proposing a number of revisions intended to hone the proposal and address public concerns without unduly increasing program costs. Staff is proposing to clarify the types of activities allowed under a Programmatic Permit, such as removal of dead, diseased, dangerous and nuisance tree species, as well as tree pruning and removal activities on City property or public rights of way. In addition, removal of healthy non-nuisance trees 6” diameter or larger would not be allowed (per Forestry Commission direction). The allowed activities could be further restricted under the specific conditions of the permit. The list of potential activities is consistent with activities that are allowed and/or would not be subject to public appeal if permitted to take place on private property. To increase transparency and accountability, staff proposes to add an annual reporting requirement so that the City Forester can track the activities and confirm permit compliance. The City Forester would inform the Urban Forestry Commission of pending Programmatic Permit applications and the submittal of annual reports at monthly Urban Forestry Commission meetings. This would allow the Urban Forestry Commission to provide feedback to the City Forester and to invite public comments to help inform the City’s Forester’s decision or review of annual compliance reports. Staff is also proposing to clarify that should the terms of a programmatic permit be violated, it would be subject to appropriate penalties, including the permit being revoked.

Staff has also received direction from the Planning Commission and Urban Forestry Commission to develop a Tree Management/Maintenance Permit proposal to address routine tree related activities on large private properties such as golf courses, cemeteries, and college campuses. This proposal would be developed and presented in the revised draft proposal for the City Council’ consideration.

II.D. Requirements for Dead, Diseased, Dangerous, Nuisance Trees

Nuisance Species Removal

“We believe some of the tree replacement requirements outlined in 11.400.070 F. (Type A permits), 11.400.080 C. 1. (Type B permits), 11.600.060 B. and C. (City and Street Trees in Development Situations) are in conflict with other City goals and policies. The permitting and replacement requirements for nuisance trees...are extremely confusing and create a disincentive to remove invasive trees... The requirement to replace nuisance trees larger than 3” diameter at breast height will discourage removal of the nuisance trees in the first place. As a result, the replacement requirements for nuisance trees are inconsistent with the recently adopted Invasive Plant Policy.” *Michael Stuhr, Chief Engineer, Portland Water Bureau (3/23/10)*

“Nuisance trees, while providing important stormwater management, erosion control and shading benefits, are a detriment to healthy watersheds. This code proposal does a good job balancing the needs for removing invasives, retaining tree canopy, and providing important environmental benefits in support of the City’s Clean Water Act compliance efforts.” *Dean Marriott, Director Bureau of Environmental Services (3/22/10)*

“Something must be done about the ivy that is taking over a huge amount of the region's trees. I believe public and private property owners must be held responsible for at least cutting it back at the base or several feet up on tree trunks -- consistently -- to prevent them from being strangled. Eradicating it altogether is, of course, the real solution.” - *M'Lou Christ (3/21/10)*

"The proposed Title 11, which would regulate all trees in the City of Portland, would interfere with the replacement of the historic street trees in Ladd's Addition...The Norway Maple is on the city's Nuisance Plant List. If Norway Maples cannot be planted in the city right of way, then it will become impossible to replace those Norway Maples in Ladd's Addition that succumb to age...The Guidelines [Ladd's Addition Conservation District Guidelines] expressly state that the "Street Tree Plan adopted by the City for Ladd's Addition governs street tree selection and replacement on each street." If a different tree is substituted for the Norway Maple on those streets where Norway Maples are the designated tree, the character of the neighborhood will change. First, the new trees will not preserve the consistency that is so important to the character of the streets. Second, any substitution will not have the scale and quality of the Norway Maple itself. I strongly urge the city to adopt a limited exception to the general prohibition on planting Norway Maples in the city rights of way so that the character of the streets in the Ladd's Addition Historic District can be preserved." *Peter Livingston (5/10/10)*

"I attach several pages from the National Register of Historic Places application for designation, which was filed in 1988...This discussion and mentions elsewhere in the application show that the existing plantings of Norway Maples are an essential part of the character of the neighborhood. The uniformity of the trees on individual streets was emphasized in the application for National Register designation because these historic plantings are critical to the quality of life and historic character of Ladd's Addition. I attach photographs showing how Norway Maples support the street plan and how efforts (mostly by the City Forester) to introduce other, more modern or trendy species have weakened the visual impact of the street trees on at least one street. In 1987, neighborhood volunteers spent hundreds of hours researching the historic trees, obtaining federal funds for new trees and organizing team of additional neighbors to plant them." *Peter Livingston (5/11/10)*

"As a past member of the Urban Forestry Commission and Vice President of Save Our Elms, I am concerned about the death warrant for Norway Maples, Portland's most popular street tree, that is hidden in the Proposed Code. The broad nuisance designation of the City's most common tree, which provides a large share of our street canopy, sends a confused message about street trees...Norway Maples and their many cultivars have provided environmental benefits to scores of Portland neighborhoods for a century or more. Oregon nurseries (e.g. JFrank Schmidt) have been national leaders in developing new and healthier cultivars of the Norway Maple. According to the Proposed Code, eradication of Norway Maples as street trees is now the City's policy and replanting of any of the cultivars is forbidden. Ladd's Addition Historic District for example was designated to the National Register in part because of its mature American Elms and Norway Maples...I agree with other testimony you have received that Historic District Norway Maples should be eligible for exceptions to the prohibition on replanting. However, the death warrant for Norway Maples needs more public outreach by Urban Forestry. If this is the direction of the City, there is a lot of public education needed about why this favorite tree is no longer allowed. Urban Forestry should be designated to work with neighborhood groups with large Norway Maple streetscapes to resolve future planting and transitions on those streets, rather than allow a menagerie of new trees to replace the Norway Maple's orderly and iconic streetscape." *Richard N Ross (5/11/10)*

"According to the **Urban Canopy Report** (2007, p17), Norway Maples are the City's "most important" street tree in numbers, leaf area, and canopy cover. They provide substantial environmental, social and economic benefits for the street system in many neighborhoods...The Tree Code bans these major street trees, without a plan for their orderly replacement or maintaining street system canopy cover. The Tree Code allows and invites removals of healthy younger Norway Maple street trees (less than 12") under Type A permits and prohibits replanting on large sections of Portland's streetscape where they now predominate. Without a mitigation plan, the Tree Code's objective of eradicating Norway Maple street trees could undermine the 2007 **Urban Forestry Action Plan Goal 1, Outcome A, Enhanced Canopy**...We believe the amendments summarized below (See ATTACHMENT) would address citywide and historic district concerns:

I. Develop a Citywide Norway Maple Street Tree Replacement Plan...

II. Recognize the adopted Ladd's Addition Historic District Open Space guidelines and Street Tree Plan as part of the Tree Code...

Richard N Ross, Vice President, Save Our Elms (6/8/10)

	<p>“...we are very concerned about the new prohibitions included in the code on "non-native" trees described as nuisance species. In particular, the new code would prohibit the planting of Norway Maples, which is among the most popular street trees in the city. This policy appears to be in conflict with Metro's "Green Streets" recommendations which list the Norway Maple as a recommended tree for streetscape plantings...We have specific concerns about how this new regulation supersedes and invalidates the landscape guidelines that are in codified by the Landmarks Commission for the Ladd's Addition Historic District...A BES document was developed in November 2005 in response to City Council order 36360 (Appendix A): "Invasive Plant Lists". In the Executive Summary of the document it states <i>"This report describes invasive plant management program elements that should be added to existing City programs to maintain existing high quality natural areas and to remove invasive plants in more heavily forested areas."</i>...It appears that the new City Tree Ordinance has taken the all the trees included in Appendix A of this 2005 document which concerned invasive plant removal from "open" "natural" areas (>0.5 acres) and applied it to "urban" "controlled" neighborhood areas without review. We ask that the Planning Commission and Forestry Division delay implementation of the city-wide ban on Norway Maples and other "nuisance" trees until a well-defined alternative plan can be developed. We further ask that the street tree provisions of the Ladd's Addition Historic District (as approved by the Landmarks Commission) be preserved in city code with modifications to the original design only implemented in the event that the viability of the designated species is threatened by disease or insects.” <i>Alexander Bassos, Chair, Hosford-Abernethy Neighborhood Development Association (6/7/10)</i></p>
	<p>Response: <i>There has been considerable discussion about whether requiring replacement of nuisance tree species is appropriate. On the whole there has been support from community stakeholders for this proposal during the initial stakeholder involvement process. The draft proposal attempts to balance goals of maintaining watershed functions provided by trees, and encouraging removal and replacement of nuisance trees with non- nuisance tree species over time. The proposal is to prohibit the planting of nuisance tree species in City rights of way and City managed property, consistent with existing limits on planting nuisance trees in City required landscaping and mitigation. Staff is also proposing revisions to the initial draft to simplify the replacement requirements for nuisance trees to a simple “tree for tree” approach when removal is permitted. The Planning Commission and Urban Forestry Commission have expressed preliminary support for requirements to replace nuisance tree species when such trees are removed. As with other replacement requirements, the Forester will retain the discretion to reduce replacement requirements when sufficient trees already exist on the site.</i></p> <p><i>Staff recognizes that there is strong concern regarding how the proposal would affect Norway Maples which are a featured element of the Ladd's Addition Historic District and elsewhere in the city. Urban Forestry and BPS staff will work with the Ladd's Addition neighborhood to determine a suitable replacement street tree that is consistent with the form and character of the Norway Maple, and therefore consistent with the historic district and other areas where the Norway Maple is a character defining street tree. Staff intends to meet with the neighborhood stakeholders to determine the best method to address the issue, with the goal of having a solution incorporated into the next draft of the proposal.</i></p> <p><i>Staff acknowledges that Norway Maples make up a significant percentage of the City's street trees. The proposed regulations are not intended to actively encourage removal of healthy mature street trees on the Nuisance Plants List, but rather to ensure that replacement trees are not nuisance species. If a request to remove a street tree is made, the City Forester would have discretion to consider the fact that the tree is a nuisance species along with other relevant factors in making the decision. The intention is that smaller nuisance trees (<12”) that have not fully matured could be removed and replaced with non-nuisance species, but that larger healthy nuisance trees would remain until their condition or age requires their removal.</i></p>
	<p>Emphasize Snag Retention</p> <p>“We recommend the following be considered and added to the proposal: Consideration of snags as important bird and wildlife habitat; encouragement for property owners to keep snags that do not pose a safety concern.” <i>Brian Lightcap, Chair West Multnomah Soil and Water Conservation District (3/18/10)</i></p>

<p>“We recommend that the Planning Commission add the following elements to further strengthen the proposal: Consideration of snags as important bird and wildlife habitat; encouragement for property owners to keep snags that do not pose a safety concern.” <i>Terri Preeg Riggsby, Chair, Tryon Creek Watershed Council (3/22/10)</i></p>
<p>“...one of the worst things we can do for wildlife is to be too tidy outdoors. <i>Snags</i> (dead, decaying trees) should and can be safely retained, as they provide tremendous value to wildlife with immense amounts of food, as well as nesting and perching sites. People removing trees should be encouraged to leave down wood (logs left on the ground) that also provides shelter and food for many small animals as it slowly returns nutrients to the soil.” <i>Eileen Stark, Biologist and landscape designer, Second Nature Garden Design (3/25/10)</i></p>
<p>Response: <i>Staff agrees that snags provide important bird and wildlife habitat. The proposal to require replacement of snags when removed will hopefully send a message that even dead trees provide important functions. The City can also provide information about the importance of snags in public information including the Community Tree Manual.</i></p>

III. REGULATORY STRUCTURE – Code Consolidation

<p>Complexity of Proposed Code</p>
<p>“The proposed draft is over 500 pages. This complexity has made it difficult for many in the public to read and comprehend the entirety of the regulations.” <i>Rebecca Esau, Manager, Land Use Services Division, Bureau of Development Services (3/22/10)</i></p>
<p>“In order for tree regulations to be successful:</p> <ol style="list-style-type: none"> 1. the regulations need to be simple - it should be possible to explain them to someone in 5-10 minutes; 2. the regulations need to be practical and reasonable; 3. the regulations need to be clear, resulting in predictable outcomes for property owners, developers, and neighbors, etc.” <p><i>Rebecca Esau, Manager, Land Use Services Division, Bureau of Development Services (3/22/10)</i></p>
<p>“Whatever regulatory solution you choose to pursue:</p> <ol style="list-style-type: none"> 1. We ask that you test it with several different case scenarios before recommending it to City Council. 2. We ask that you also test it by each of you trying to explain the regulations to someone in 5-10 minutes, and having them understand it. 3. We ask that it not try to solve all of the tree problems that can be conceived of, but that it follow the 80-20 rule, i.e., that it be a good approach for 80% of the situations. 4. We ask that it not be heavy-handed and overly expensive in a way that turns the public against trees, un-doing the good work Urban Forestry staff has done in promoting the planting, care, and preservation of trees in the City. 5. We ask that you think broadly about all of the City goals we are trying to achieve on small infill lots, including many of our sustainability goals, such as dealing with stormwater infiltration on-site, solar panels, vegetable gardens, fruit trees, natural light for windows, etc. and how these goals mesh with tree preservation and tree density standards on small, constrained sites. Natural light and sunshine are valuable commodities as are trees and shade...please strive for balance as well as providing options for people. 6. We ask that you remember that the success or failure of any regulation is largely based on adequate, ongoing funding to support implementation.” <p><i>Rebecca Esau, Manager, Land Use Services Division, Bureau of Development Services (3/22/10)</i></p>
<p>“Customer friendly – All tree regulations need the support of the regulated community. They should not be so complicated and confusing that they intimidate and bewilder rather than communicate the desired outcome. Complex code is often a disincentive to the intended outcome.” <i>David McAllister, City Forester and City Nature Manager, Portland Parks and Recreation (3/23/10)</i></p>

<p>“Efficient and cost-effective - Ultimately City staff will have to implement any City Code that is approved. Regulations affecting trees need to provide flexibility for tree professionals to work with the public rather than the code being an impediment to this effort. Trees are living things that code, no matter how prescriptive, can adequately address.” <i>David McAllister, City Forester and City Nature Manager, Portland Parks and Recreation (3/23/10)</i></p>
<p>“The Citywide Tree Policy Review draft under consideration moves the City in a positive direction but Urban Forestry believes that additional consultation between bureaus will improve the code language. Specifically we think that each of the four bulleted outcomes...should be modified and in some cases a different approach taken. (Bulleted items are: fairness and equitability; tree preservation and mitigation; customer friendly; efficient and cost-effective).” <i>David McAllister, City Forester and City Nature Manager, Portland Parks and Recreation (3/23/10)</i></p>
<p>“As noted by the Bureau of Development Services, at more than 500 pages of text, the February 2010 Draft is overly complex and will be very difficult for users, both City staff and the general public, to understand and implement. As a result, we urge you to direct staff to return with a substantially simplified proposal. in addition, we urge you to hold at least one additional hearing in order to take additional testimony prior to making a recommendation to City Council.” <i>Tom Bouillion, Planning Manager, Marine & Industrial Development, Port of Portland (4/13/10)</i></p>
<p>“The interface between proposed Title 11 and Title 33 is not totally clear. While staff has stated that one or the other, but not both would apply, the draft language does not convey that concept in all cases.” <i>Tom Bouillion, Planning Manager, Marine & Industrial Development, Port of Portland (4/13/10)</i></p>
<p>“The proposed draft represents a more complex and expanded set of regulations that will require additional staff, additional training, and additional outreach. It will certainly add time and may increase confusion for most tree permitting activities. The proposed code should emphasize professional judgment with an explicit set of standards rather than the proposed listing of alternative approaches that may or may not meet the intent.” <i>David McAllister, City Forester, Portland Parks and Recreation (4/12/10)</i></p>
<p>“Our belief is that the challenge before the Portland Planning Commission and the Urban Forestry Commission is to consolidate the existing tree regulations into a cohesive, simple regulatory package and amend the proposed regulations in a way that will result in the ongoing development of a strong tree canopy in Portland while balancing other City goals. As has been pointed out, the proposed regulations need to be radically simplified...so that users of these regulations can understand them and to lower administration/implementation costs for the City and property owners. As currently proposed, the costs would be too great to rely solely on fee revenue (or fees would be too high, and would act as a disincentive for people to get permits). The program as proposed would need to be heavily subsidized by the General Fund, and this is not feasible given the City's financial situation.” <i>David Nielsen, Chief Executive Officer, Home Builders Association of Metro Portland (4/27/10)</i></p>
<p>General Support for a Consolidated Title</p>
<p>“The proposal that is being brought forward this week will create clear, simple, consistent and comprehensive protections for our urban trees.” <i>Scott Fogarty, Executive Director, Friends of Trees (4/13/10)</i></p>
<p>“Please vote to revise and consolidate the tree code. I have seen big beautiful trees in our neighborhood cut down to extend parking space on private lots and then no one parks there, but the eagles that used to frolic in the tree-tops don't return. Thank you!” <i>Brian Parks (3/23/10)</i></p>
<p>“Please vote to strengthen and consolidate codes protecting Portland's tree canopy. The loss of large, mature trees is a loss of a very valuable asset and cannot be mitigated by planting smaller trees in their place. If we expect to reach our target of 33% tree canopy, we need stronger codes protecting the existing canopy and encouraging the planting of new trees.” <i>Eileen Schill (3/20/10)</i></p>
<p>“I also support and believe in what the revised Tree Code and Policy will do, including the new policy which is set to do the following future planning items for us all: Consolidate all tree code regulations into a single regulatory title---Previously tree protection regulations were scattered throughout the city code titles and were often confusing and inconsistent.” <i>Nana Nash. M.A., Member of Audubon Society of Portland and Friends of Trees (3/23/10)</i></p>

<p>"As I indicated in my testimony I am pleased to see that the current proposal brings forward many of the changes that were requested years ago by the SWNI Tree Committee including: the consolidation of tree codes in one place....The current proposal is a large document. Staff did an excellent effort of shepherding a diverse group of stakeholders through a lengthy and complex code to flesh out concerns, issues, and practical ways to address concerns. At first glance it hardly seems that the proposal is a simplification of the existing code. However when examined more closely it documents the purpose of the code consolidates code from many areas, and provides more clarity than the existing code... I do have concerns that the proposal needs some fine-tuning. Despite the efforts of staff to create a streamlined and more coherent code, this proposal is still too complex and hard to wade through." <i>Margot Barnett (4/1/10)</i></p>
<p>"...the Johnson Creek Watershed Council applauds the Bureau of Planning for their work on this effort. The proposal will create clear, consistent and comprehensive protections for our urban trees. We strongly encourage the Planning Commission and Urban Forestry Commission to recommend to Portland City Council to adopt and fund this program." <i>Matt Clark, Executive Director, Johnson Creek Watershed Council (4/12/10)</i></p>
<p>"The current project came about to bring various code elements together from many different bureaus and combine them into one area of the code. The result <u>is</u> complex and may be overly complex, but it can't be as complex as having the code spread throughout many bureaus for their interpretation, implementation, and disclosure...The Tree Project came about in the absence of a coherent city policy about trees. That, in my opinion, is what you are being asked to recommend to Council for adoption. The process to implement the policy should be subject to more attention and work during FY 2011-2012, with a set timeline for beginning implementation funding in the near future." <i>Bonny McKnight (4/12/10)</i></p>
<p>"...The Tree Policy would allow for a concise and consistent City repose to issues relating to trees. Currently, there is confusion amongst citizens and staff, between bureaus and within the development community regarding trees. Title 11 will provide a clearer understanding for residents and businesses. East Portland Parks Coalition thanks the City of Portland for supporting Title 11 and funding the project. We strongly encourage adoption of Title 11." <i>Alesia J. Reese, Chair, East Portland Park Coalition (4/6/10)</i></p>
<p>"Some might say no regulation is good regulation. The goals of these new, updated policies is to streamline existing complicated, conflicting and ineffectual regulations; not to create new ones." <i>Jim Thayer, Southwest Hills Residential League, President (3/23/10)</i></p>
<p>"The Council reached consensus about the importance of making the tree codes easier to find, more equitable, and easier to understand. We also support the creation of a comprehensive framework for both public and private trees and for development and non-development situations. There is also agreement that inconsistencies, contradictions and gaps in coverage need to be fixed." <i>Jane A. Van Dyke, Executive Director, Columbia Slough Watershed Council (4/9/10)</i></p>
<p>"We are delighted by the City's decision to elevate the importance of trees by strengthening and combining the various, and sometimes conflicting, tree codes into a single cohesive and consistent source. This revision makes the tree codes more equitable and easier to access and understand. We also support the creation of a comprehensive framework that addresses both public and private trees in both development and non-development situations. This is a huge step forward. The existing code has many inconsistencies, contradictions and gaps in coverage that have needed to be fixed." <i>Jean Fike, Executive Director, East Multnomah Soil and Water Conservation District (5/10/10)</i></p>
<p>"Fire & Rescue applauds the City Tree Code improvement project, moving tree regulations from the many city titles and rules, and placing as many of those rules as practical into the new Title 11. The code consolidation will make it easier for City staff, the public, and developers to navigate tree rules. While Fire & Rescue is in agreement on the importance of trees to the City--the aesthetics, ecology, and heritage--because of our public safety mission, it is incumbent on us to insert some caution into the process. One truth about trees is that under fire conditions, they are fuel. If the purpose of the Title 11 is to preserve and protect trees, it is not a leap to provide tools to homeowners in the wildland interface areas to protect their homes, and therefore, their trees from fire." <i>Richard Haney, Assistant Fire Marshal, Portland Fire & Rescue (5/25/10)</i></p>
<p>Response: Staff appreciates both the support for a consolidated tree code, and concern about code complexity and need to simplify Title 11 and ensure that its relationship to Title 33 is clear. Staff from the Bureaus of Development Services, Environmental Services, Parks, Transportation and Water have been working with Planning and Sustainability staff to simplify proposed procedures in Title 11 and make them more user-friendly and less costly to implement. City staff have developed some simplifications to proposed Title 33 provisions as well. The Planning Commission and Urban Forestry Commission have expressed preliminary support for a number of the proposed simplifications. Staff expects to further hone and simplify the proposal in the recommended draft to City Council.</p>

	<p>Consolidation of Tree Funds</p>
	<p>“The draft code deals with established and authorities for payment in lieu. This draft code language confuses authorities previously established under the City Urban Forestry Tree Fund and Title 33 private tree fund. The new code should be changed to reflect historic authorities and responsibilities for allocation of these funds.” <i>David McAllister, City Forester, Portland Parks and Recreation (4/12/10)</i></p>
	<p>Response: <i>The proposed draft intentionally defines the uses of the tree funds based on specific discussion from the Stakeholder Discussion Group. Funds collected as payments in lieu of planting or preserving trees must be used to plant trees in the same watershed or preserve trees through conservation easements or land purchase. The Urban Forestry Fund is more general in nature, collected from imposition of fines, fees or other sources. This fund can be used for a broader range of forestry related activities including education and outreach. The proposed draft includes new annual reporting requirements for how the funds were expended to ensure transparency, accountability, and to market the service the City has performed with the monies collected.</i></p>
	<p>Specific Code Language Comments</p>
	<p>Proposed Code: Introduction (Table 1): “Private Trees” and “Development Trees” Comment: Although it appears this is explained in more detail in later sections, the difference between “Private Trees” and “Development Trees” may result in confusion, since most trees involved with development will be on private property. In addition, there is no definition of just “Development” (e.g., “...when specific types of development are proposed”) in Title 11.” <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
	<p>Response: <i>Staff will include a definition for development in the revised draft, and will also clarify “Development Trees” by rewording as “trees in development situations.” This will clarify that trees in development situations are not a separate type of tree, but rather a “Private,” “City,” “Street,” or “Resource Area” tree located on a developing site. In Table 1, “trees in development situations” will be accompanied by additional explanation of how the development requirements in Chapter 11.600 would apply.</i></p>
	<p>Proposed Code: Introduction (Table 2) Comment: This chart is helpful, but the difference between “Other Activity” and “Development” is unclear. Also, “Development” is not defined, and it is not clear how development applies to “Street” and “Resource.” It is not clear if this means that in addition to environmental review required for disturbance in an e-zone, for example, that a tree permit review will also be required. A possibility would be to indicate on this chart what type of tree permit (i.e., A, B, or C) is required for each activity/location. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
	<p>Response: <i>The table will be simplified to correspond with other revisions to the project proposal. Staff agrees that the inclusion of “development” in this table implies that a separate tree permit would be required, which is not the intent. Staff envisions removing “development” from this table and changing the title to “Activities that Require Tree Permits”. We may also replicate Table 600-1 in the introductory chapter to specifically address trees in development situations.</i></p>

<p>Proposed Code: 11.100.030 Code Administration and Duties Performed <i>“This Title is primarily implemented by two City officials; the City Forester and the Bureau of Development Services (BDS) Director. The City Forester is responsible for Street Tree development requirements and administering the rules affecting other trees when not associated with a development project. The BDS Director is responsible for ensuring compliance with Title 33 overlay and plan district requirements as part of the tree permitting program, and land use and development approval requirements as part of the development process. In addition to the City Forester and BDS Director, the City Engineer has a role as further described below in the resolution of infrastructure conflicts within the public rights of way and city-owned easements.”</i></p> <p>Comment: This section exemplifies the concern we have regarding the complexity of the code and how (and by whom) the review of tree applications will occur. This section indicates the City Forester and BDS Director will oversee these regulations, which results in oversight by two separate bureaus. In addition, the City Engineer, who is in a separate bureau (PBOT), is also involved when trees are in rights of way and public easements. In addition, the bureau responsible for preparing this code is a separate bureau (BPS), which is not a reviewing agency. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
<p>Response: <i>The benefit of the consolidated title is that it explicitly describes the respective roles of the bureaus in administering the rules. Specifically, BDS oversees development-related requirements outside the right of way, the City Engineer oversees development related requirements in the right of way, and the City Forester oversees non-development related requirements, whereas these responsibilities were previously spread across multiple city titles. Given the different missions, programs, and expertise contained within each of the bureaus, these roles are appropriate but do create a need for ongoing coordination.</i></p> <p><i>BPS is proposed as the bureau in charge of “stewarding” Title 11, given its role in citywide policy and code development, consistent with the City Council’s direction to lead and coordinate with other bureaus for the Citywide Tree Project.</i></p>
<p>Proposed Code: Hierarchy of Regulations (D. Relationship to Title 33, Planning and Zoning) Comment: We are not aware of another situation in City code where two titles (i.e., 11 and 33) are so closely referenced and connected. We are concerned there will be conflicts between the two titles and this will complicate review/implementation. <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p> <p>Response: <i>City titles routinely cross reference other city titles. Some titles contain direction on how to resolve conflicts internal to the title, but offer little guidance when there is a conflict between titles. Conflicts can and already do occur between separate titles of City code, which can make particular proposals subject to overlapping and duplicative regulation. One benefit of including the Hierarchy of Regulations section is that it gives the public and City clear guidance on how to resolve such conflicts. Creating a strong, explicit link between these two titles (11 and 33) was intentional.</i></p> <p><i>The Planning Commission and Urban Forestry Commissions have directed staff to develop a process for monitoring how the new code provisions work out over the first year or two. During this time staff will connect with stakeholders, including the development community, to identify problems and potential improvements.</i></p>
<p>Proposed Code: General Terms Comment: We have concerns regarding definitions for “Development Impact Area” as it relates to industrial/employment uses, as frequently an entire site may be disturbed to accommodate a project (except for resource areas). This is due to the need for flat areas for industrial buildings, and the grading and filling that must occur. We question that this definition is necessary as it relates to tree replacement, but may be useful if only a portion of an undeveloped site is proposed for development. We are also concerned with how a “grove” will be determined, since the definition includes terms such as, “...that form a generally continuous canopy over a non-linear area, or where tree spacing is generally characteristic of that species or species assemblage.” <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>

Response: The development impact area is a tool that applicants can choose to use to delineate a distinct portion of their site. These provisions are to address situations where an applicant may be developing only one small area within a large site (e.g. an industrial park is adding a new access driveway). The intent is to limit the amount of information required to be submitted with the application. Where a majority of the site will be disturbed, the development impact area provision may not be an appropriate tool for an applicant to use.

We will clarify the definition of the development impact area by substituting “the area on a site affected by any and all site improvement...” with “the area on a site affected by proposed development...” so that its more clear that existing buildings and parking lots, etc. do not need to be included in the designated impact area.

Regarding “groves”: It is difficult to establish a clear and objective standard for delineating a grove due to the variability in particular tree species growth habits and the complex relationships between grove trees. Too rigid a definition may result in groupings of trees being considered groves, even though they are not functioning as a grove. Too flexible a definition may prevent application of a requirement to critical “edge” trees. Because of the need for professional determinations to establish and evaluate impacts to groves, the term is primarily applicable in discretionary land use reviews and tree removal permits where tree professionals are already involved in the review. The next draft will clarify that tree groves may include smaller trees and understory, and that protection of the smaller trees of the predominant native species of the grove is a priority unless thinning to improve the health of the grove is called for in an arborist report. The next draft will clarify that groves are not a consideration in the development standards associated with building permits.

IV. CUSTOMER SERVICE IMPROVEMENTS

General Comments in Support

“As I indicated in my testimony I am pleased to see that the current proposal brings forward many of the changes that were requested years ago by the SWNI Tree Committee including: the consolidation of tree codes in one place, creating a single point of contact, a hotline number for weekend tree cutting concerns, creating a code that is consistent, implements policy and is more equitable across property types, development of a Tree manual. The Urban Forestry Program has already taken steps to strengthen and reshape the Tree Liaison Program (now renamed Neighborhood Tree Stewards).” *Margot Barnett (4/1/10)*

“The single point of contact and single manual is helpful in offering citizens a better connection to information. I support neighborhood tree plans to reflect the differing needs of individual areas and to engage local citizens in feedback. Because half of Portland’s tree canopy is in private hands, the educational outreach will be a crucial element. In fact, it would be very beneficial to do more education than outlined in the policy.” *Barbara Quinn, Chair, Friends of Cathedral Park Neighborhood Association (3/26/10)*

“The proposed Tree Manual and single point of contact for citizen inquiries will be a very important part of this program. Both should be developed and implemented as soon as possible.” *Linda Robinson (4/13/10)*

“The proposals in the Review and draft amendments are not focused only on increasing canopy cover in our city, but increasing clarity and communication of regulations concerning trees. I strongly support the creation of a tree manual as a resource for home and business owners, developers, and arborists. There are many resources for identification, choosing, planting, and pruning trees on the web, but it’s currently difficult for the average Portlander to find rules regarding what they can and can’t do to trees. It’s unfair to hold people accountable for what they don’t know. A contact person at the city to answer questions, handle complaints, and document violations will create goodwill and allow the city to respond to problems in a timely fashion.” *Jim Wentworth-Plato, BCMA (Board Certified Master Arborist) (3/24/10)*

“We strongly support components of the new policy, including... 24-hour tree hotline, single point of contact for the public, and Community Tree Manual.” *Nancy Seton, SWHRL Neighborhood Assn. Land Use Chair, Board Member (3/23/10)*

<p>"I also support and believe in what the revised Tree Code and Policy will do, including the new policy which is set to do the following future planning items for us all: Create a 24 hour hotline to allow citizens to get information and report illegal tree cutting; Create a single point of contact within the city for members of the public wanting to get answers for tree related questions; Create a Community Tree Manual to pull together information on the City's tree protection policies, regulations and programs";" <i>Nana Nash. M.A., Member of Audubon Society of Portland and Friends of Trees (3/23/10)</i></p>
<p>"I have found navigating the current policies, regulations and laws related to 'city trees' to be a very confusing and time consuming process. The recommendation to have a 24 hour information hotline as well as one source to consult for all regulations governing trees would have helpful. Our choice to purchase a home in Portland was due to many reasons; high on the list was the value that Portland places on the Urban Canopy. I found that the infrastructure for supporting the Urban Canopy (consistent easy to find regulations, laws and permitting process) surprisingly lacking when I was faced with this recent conflict. I feel that many of the recommendation made by the City Wide Tree Project would begin to truly support the goal of a healthy Urban Canopy in more than just words." <i>Jenny Wadman (5/11/10)</i></p>
<p>Patricia Kozak supported the project, explaining that a Douglas Fir tree across the street was a deciding factor in her buying a house near Ladd's Addition 2.5 years ago. She described questioning tree removal at a lot across from her house when someone purchased the lot, but she didn't know who to call, how to determine if the developer had a permit or what Code provisions applied. She suspected it was illegal to cut down a 65-80-ft tree on a Saturday, finally contacted Urban Forestry, but they couldn't inspect until Monday, by which time it was too late. They measured the tree stump, which was about 18 inches and confirmed the developer didn't have a permit. - <i>Patricia Kozak, Excerpt from (3/23/10)Joint Planning and Urban Forestry Commission Minutes</i></p>
<p>Patti Schnabel added to Patricia Kozak's testimony in support of the project because illegal tree removal happens quickly. She reported that the owner of the property where the tree was cut said it was his understanding he could cut down his own trees without a permit, and the arborist he hired told him he could. She said Urban Forestry has since imposed a fine due to the size and species of tree and because he was required to save a percentage of trees on his property. She challenged the claim that only 14 violations were reported last year, because it's so difficult to find information. - <i>Patti Schnabel, Excerpt from (3/23/10)Joint Planning and Urban Forestry Commission Minutes</i></p>
<p>Response: <i>While this project was identified in the Urban Forest Management Plan – Action Strategy (2007) a policy review and regulatory improvement project, the charges was also to address and improve related procedures. Staff recognizes and appreciates that there is strong community support for the customer service improvements that emerged through the stakeholder discussions and subsequent development of the code. Staff agrees that these recommended improvements, while not the core charge of the project, would greatly improve community awareness, understanding, and access to the City's tree policies, rules and programs.</i></p>
<p>Community Tree Manual</p>
<p>"We view the Tree Manual as a critical component of this program. The Tree Manual will provide the community with a roadmap of what compliance with this program looks like on the ground and a variety of options for implementation. We urge the City to look to BES' outstanding Stormwater Manual as a template for how the Tree Manual should be developed. We are concerned that while funding costs are included in the draft Tree Program, this element of the program will wind up being cut or dramatically reduced in scope and concept. We do not believe that simply patching existing documents together will suffice. A well written, coherent and comprehensive Tree Manual is integral to the success of this effort." <i>Bob Sallinger, Conservation Director Audubon Society of Portland; Jim Labbe, Urban Conservationist, Audubon Society of Portland; Mike Houck, Executive Director, Urban Greenspaces Institute; Ron Carley, Co-director, Coalition for a Livable Future; Jill Fuglister, Co-director, Coalition for a Livable Future (3/23/10)</i></p>
<p>"...the Tree Project moves us to recognize trees as being a unique type of public good – a Green Infrastructure. As we move to that recognition much of the Tree Project work will be done through information, education, and public interaction, not by rule writing and enforcement. The Community Tree Manual is a key element in this educational approach, for school children to developers and builders to homeowners." -<i>Bonny McKnight (3/23/10)</i></p>
<p>"The Tree Technical Manual will help the City adapt quickly to changing scientific information and best management practices while providing clear and detailed information for property owners and developers." <i>Margot Barnett (4/1/10)</i></p>

	<p>“...With the extent, detail, and complexity of this proposed code language, we question why the tree manual concept was not part of the current program. A tree manual approach, similar to a stormwater manual, would help to provide much more flexibility and best management practices that cannot be accomplished by a rigid zoning code that is subject to strict land use review procedures. If funding is not currently available to implement the tree manual, it seems a possible result is non-user friendly regulations until the funding is in place. Our concern is that the City cannot contemplate enough code to address the numerous situations that arise with trees. With the amount of code changes currently proposed, it seems less code combined with a tree manual and best management practices is a more appropriate approach for tree protection/preservation.” <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p>
	<p>Response: <i>Support for the Community Tree Manual is duly noted. Staff agrees that the manual could be a valuable tool to educate the public about the benefits of trees and best management practices. Staff also acknowledges the role the manual could play to further explain the intent of the City’s tree regulations, and provide tools, tips and examples for how to best comply. Staff from the various City bureaus have begun to scope the Community Tree Manual project and collect existing information from other jurisdictions in hopes that the project will be funded as an early action item.</i></p>
	<p>Education and outreach</p>
	<p>“We recommend the following be considered and added to the proposal: Education and training for the local arborist and landscaping community regarding the new rules. Adequate funding for community outreach and program implementation, most importantly enforcement.” <i>Brian Lightcap, Chair West Multnomah Soil and Water Conservation District</i></p>
	<p>“If you polled Portland property owners, the majority of them probably have no idea that the City has any tree regulations and it wouldn’t even occur to them to ask if they need a tree cutting permit. They also are not aware of this current proposal. The point is that ongoing outreach and education are key to any regulatory approach to trees, and this requires dedicated funding on an ongoing basis.” <i>Rebecca Esau, Manager, Land Use Services Division, Bureau of Development Services</i></p>
	<p>“We recommend that the Planning Commission add the following elements to further strengthen the proposal: Education and training for the local arborist and landscaping community regarding the new rules [and] adequate funding for community outreach” <i>Terri Preeg Riggsby, Chair, Tryon Creek Watershed Council</i></p>
	<p>“Maybe nurseries and growers could be asked to hand out a simple list of things to do and not to do when planting or caring for a tree. I understand that a major reason for tree failure is simply planting trees too deeply or topping them or spraying too much “weed and feed” around them. Sometimes it’s just a matter of putting out some basic information.” <i>Robert Elan (4/12/10)</i></p>
	<p>Response: <i>Staff appreciates this strong support for education and outreach, both to facilitate compliance with current and future tree regulations, and to build community awareness and knowledge about trees and how to care for them. The Customer Improvement recommendations in the proposal contain strong educational components and improve community access to information about trees, tree care, and general and site-specific tree requirements. The City has other tree-related education and outreach programs as well. Staff encourages community stakeholders to continue their vocal support for such programs and to reiterate their support when the Citywide Tree Project is considered by the City Council this fall.</i></p>

V. IMPLEMENTATION, COST AND STAFFING

"In order for tree regulations to be successful: 1) the regulations need to be simple - it should be possible to explain them to someone in 5-10 minutes; 2) the regulations need to be practical and reasonable; 3) the regulations need to be clear, resulting in predictable outcomes for property owners, developers, and neighbors, etc. 4) the regulations need to be sustainable over time from a budget perspective, with adequate funding for all aspects of implementation, including: a. robust and ongoing public information, outreach and education component; b. staffing to administer the regulations in non-development situations; c) staffing to administer the regulations in development situations and perform the necessary functions: plan review; inspections prior, during and after construction; responding to complaints and un-permitted tree cutting; and responding to general questions about the regulations from the public." *Rebecca Esau, Manager, Land Use Services Division, Bureau of Development Services (3/22/10)*

"Overly complex code is also costly to the City and the regulated community. Also, costs need to include implementation, compliance monitoring, and enforcement. Cost efficiency = code efficiency." *David McAllister, City Forester and City Nature Manager, Portland Parks and Recreation (3/23/10)*

"Trees are a \$5 billion dollar asset of the City and provide drainage and watershed health ecosystem services, often for a fraction of the cost of providing single-objective grey infrastructure solutions." *Dean Marriott, Director, Bureau of Environmental Services (3/22/10)*

Priority Implementation Actions (summarized – see letter for additional detail): The following activities should be completed before the end of calendar year 2010:

- **A Comprehensive Tree Manual** - develop a Tree Manual scope that recognizes and supports *all* the values of trees/
- **Administrative Rules** – develop rules to provide details about decision making not included in the code.
- **Funding** - advocate for a multi-bureau process to look at new sources of funding for this project.
- **Portland Plan Efforts** – making space for trees needs to be addressed in this process."

Dean Marriott, Director, Bureau of Environmental Services (3/22/10)

Early Implementation Actions: "There are a number of items within this code proposal that are cost neutral or are prerequisites for implementing the proposed code in 2011, and could be implemented in 2010, including but not limited to:

- Implementing tree fund usage changes – allowing spending on a broader variety of tasks;
- Clarifying tree definitions;
- Modifying and clarifying who may apply for permit changes;
- Implementing programmatic permits;
- Implementing the diseased wood parts of the code;
- Activating the allowance for tree master plans for conditional use sites;
- Allowing the density, pedestrian path, front set back and other flexibility within the zoning code; and
- Initiating BES ex-officio membership in the Urban Forestry Commission"

Dean Marriott, Director, Bureau of Environmental Services (3/22/10)

"Any regulations that interfere with our ability to use the right of way for utility purposes or unduly restrict the placement of facilities on Water Bureau own property will have an impact on the rates we must charge for water." *Michael Stuhr, Chief Engineer, Portland Water Bureau (3/23/10)*

"Portland's Climate Action Plan...Wouldn't the money spent on this proposal be better used in cleaning up polluting plants where we get a better return on our money than less than 1/3 of one percent? Additionally...much of those emissions come from the current homeowner community. Why burden the building community or the purchaser of a new home? Shouldn't there be a tax on every Portlander to recover the expense of the carbon emissions they create, not just penalizing the few?" *Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)*

<p>“We have heard some people question whether the costs associated with this plan would be better spent simply planting more trees. To that question we offer an emphatic ‘no.’ Portland has outstanding tree planting efforts conducted by both city bureaus and non-governmental organizations and support for those programs must continue. However, the greatest bang for the buck comes from protecting what we already have in the ground. The estimated replacement value of our urban tree canopy is nearly \$5 billion (Karps et al 2007). Many tree species do not reach their full potential for decades and over time the costs of maintaining a tree are dwarfed by the ecosystem services that mature trees provide. We need to protect and maintain trees just as we do other components of our urban infrastructure. In order to reach the city’s canopy target of 33% canopy coverage, we must accelerate our tree planting efforts, but the foundation of Portland’s tree canopy strategy must be focused on preservation and stewardship of our existing canopy. We are pleased that the city is working towards the ability to capitalize trees. The logistics of such a change may take time to work out, but from a practical perspective it makes sense to protect and maintain trees just as we do other capital assets.” <i>Bob Sallinger, Conservation Director Audubon Society of Portland; Jim Labbe, Urban Conservationist, Audubon Society of Portland; Mike Houck, Executive Director, Urban Greenspaces Institute; Ron Carley, Co-director, Coalition for a Livable Future; Jill Fuglister, Co-director, Coalition for a Livable Future (3/23/10)</i></p>
<p>“My interest in urban forestry stems from my environmental health training which recognizes the vital role urban forests play in providing clean air, shade, water filtration, and other human health benefits in addition to habitat, stormwater and carbon sequestration functions. We are increasingly recognizing the infrastructure value of trees. This proposal does have costs attached but these costs are small compared to the costs of not caring for and sustaining this asset. Bearing in mind that at least half of the urban forest canopy is on private property it is important to ensure that we provide resources to address this vital aspect of Portland’s livability.” <i>Margot Barnett (4/1/10)</i></p>
<p>“It will be critical to find a balance to address costs, provide flexibility while addressing many different site situations, and ensure funding and implementation of this plan.” <i>Margot Barnett (4/1/10)</i></p>
<p>“We recommend that the Planning Commission add the following elements to further strengthen the proposal: Adequate funding for program implementation, most importantly enforcement.” <i>Terri Preeg Riggsby, Chair, Tryon Creek Watershed Council (3/22/10)</i></p>
<p>“The proposal is to delay the effective date for at least a year. This will provide time for the City to "gear up" for the change. I'm concerned, however, that little if any funding has been allocated for the 2009-2010 fiscal year to set up the single point of contact, create the Tree Manual, prepare printed information explaining the changes, do the staff training and conduct the public outreach (to both tree care professionals and citizens) - all the things that need to be done before the new code goes into effect.” <i>Linda Robinson (4/13/10)</i></p>
<p>“Even if the City is unable to fund certain pieces of the Tree Project, it is important the overall package, code changes and policies are implemented now. If funding were not initially available, pieces like “Community Tree Manual” could be phased in / developed later, but at least the whole project would be adopted by the City. This is truly an opportunity for the City of Portland to provide real tools and opportunities on the ground to support its goals as a green and sustainable City to address many of the egregious practices in the removal of our urban forest and its negative impacts on our communities.” <i>Jim Thayer, Southwest Hills Residential League, President (3/23/10)</i></p>
<p>“Such extensive changes in tree regulations will require substantial investment in implementation and training (of permit staff, inspectors, arborists and others) - and extensive public outreach before and after the new regulations are implemented. We urge the City to move forward on the proposed Tree Code as soon as possible, as it will be a very useful tool in this education and outreach.” <i>Jane A. Van Dyke, Executive Director, Columbia Slough Watershed Council (4/9/10)</i></p>
<p>“Mayor Adams met with Bureau Directors and the City’s Labor leaders on April 15, 2010, and discussed the City’s financial situation. The City is in a very challenging time financially and many bureaus will need to cut staff and programs. There will be no General Fund money to fund new tree regulations or the positions necessary to administer them...Adding new regulations without a funding source will only worsen the situation, and is simply unacceptable. Given our financial situation and reduced staffing levels, BDS is not in a position to take on any new regulation or task that will add cost or complexity to the bureau’s service delivery...The Bureau of Development Services recommends the following: Focus on a cost-neutral approach now - Find small, incremental code improvements that we can move forward with to achieve project goals, that won't add cost. Then ask BPS to monitor these changes, and return in several years with Phase II to make further improvements.” <i>Paul Scarlett, Director, Bureau of Development Services (4/26/10)</i></p>

<p>"Delaying the effective date is not enough without radically simplifying the regulations. The regulations are overly complicated and too expensive to administer, even in the best of financial times." <i>Paul Scarlett, Director, Bureau of Development Services (4/26/10)</i></p>
<p>"It is not realistic to assume that the proposed tree regulations can ever be completely supported by Tree Permit fee revenue alone. If the program were completely funded by fee revenue, the fees would be too high and would act as a disincentive for getting the required Tree Permits...The reality is that the costs to administer tree regulations will require a subsidy from either the General Fund or some other source, on an ongoing basis." <i>Paul Scarlett, Director, Bureau of Development Services (4/26/10)</i></p>
<p>"The Bureau of Development Services is in the process of having to cut an additional 17 positions this month due to our bureau's financial situation...For this reason, my staff and I are no longer able to participate actively in the discussions and development of further iterations of the proposed tree regulations. We believe with this memo, we have conveyed our issues and concerns and our recommendations...On May 6th, the Mayor released his proposed budget for fiscal year 2010-11. BDS had requested additional one-time and ongoing General Fund support for the Neighborhood Inspections and Land Use programs and to allow the bureau to restore service levels by adding staff. Unfortunately, the Mayor did not approve our requests for additional General Fund support...We will be the bureau responsible for administering the tree regulations associated with development situations, including: public information, land use reviews, plan review and building permits, inspections, responses to complaints, and enforcement. Due to our situation, and growing backlog of work, not only can we not dedicate time to the further development of these regulations, we are again emphasizing the point that whatever the regulatory outcome is: a) It needs to be cost-neutral ...b) The regulations need to be very simple...The three essential elements necessary to achieve the greatest compliance with regulations: People are aware of the regulations; People can understand the regulations because they are clear and very simple; and The regulations are reasonable." <i>Rebecca Esau, Manager, Land Use Services, Bureau of Development Services (5/11/10)</i></p>
<p>"There will be significant personnel time required to make these new rules real on the ground. We believe that trees are among this City's greatest treasures - they define our region. We urge the Council to fund the capacity needed to fully implement this "new" code." <i>Jean Fike, Executive Director, East Multnomah Soil and Water Conservation District (5/10/10)</i></p>
<p>Response: <i>The proposal is intended to promote cost-effective increases in tree-related investments – investments that improve the quantity and quality of Portland’s urban forest, while also supporting other City goals. Taking into consideration comments from the public and City bureaus, and current budget constraints, bureau staff have worked collaboratively to develop approaches to simplify and significantly reduce the cost of the proposal, while continuing to meet project goals for a cohesive regulatory framework that protects and enhances the urban forest. Feedback from the Planning Commission and Urban Forestry Commission on the proposed revisions will be reflected in the revised draft proposal.</i></p> <p><i>Staff appreciates the public recognition of the asset value of trees and the benefits they provide, as well as the need for funding to support the urban forest. Staff agrees that funding is needed to plant trees, as well as to provide an efficient regulatory framework to protect the asset. Staff are working with the implementing bureau directors and the Planning Commission and Urban Forestry Commission to identify priorities for early implementation and a phased implementation and funding strategy.</i></p>

VI. GENERAL COMMENTS

<p>Compliance with Metro Title 13</p> <p>"Overall, we believe that the Citywide Tree Policy Review and Regulatory Improvement Project represents a major step forward in the city's efforts to achieve its urban canopy objectives. In addition, adoption is essential for compliance with Metro Title 13." <i>Bob Sallinger, Conservation Director Audubon Society of Portland; Jim Labbe, Urban Conservationist, Audubon Society of Portland; Mike Houck, Executive Director, Urban Greenspaces Institute; Ron Carley, Co-director, Coalition for a Livable Future; Jill Fuglister, Co-director, Coalition for a Livable Future (3/23/10)</i></p>
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	<p>Response: Completion of the Citywide Tree Project is explicitly mentioned as part Portland's compliance strategy in the Bureau of Planning and Sustainability's request for extension of the Title 13 compliance deadline (January 21, 2009).</p>
	<p>Moving toward Green Infrastructure; Tree Ecosystem Services</p> <p>"The Tree Project and its inherent recognition of the multiple canopy, watershed, and personal values of trees will allow us to finally deal with trees as Green Infrastructure, an important public asset providing public good, habitat for other living creatures as well as ourselves, and a core element in the enjoyment of living in Portland." -<i>Bonny McKnight (3/23/10)</i></p> <p>"Expansion of our city's green infrastructure to address urban stormwater capacity is essential keep the city's most expensive project, the \$1.4 billion Big Pipe, from becoming overwhelmed as additional impervious surface is developed on our urban landscape. We believe that the costs associated with this proposal, including any additional costs associated with our above recommended amendments, represent smart, strategic and proactive investments in the City's green infrastructure. For every dollar currently invested in tree maintenance, Portlanders receive nearly \$4 in economic and ecosystem benefits." <i>Bob Sallinger, Conservation Director Audubon Society of Portland; Jim Labbe, Urban Conservationist, Audubon Society of Portland; Mike Houck, Executive Director, Urban Greenspaces Institute; Ron Carley, Co-director, Coalition for a Livable Future; Jill Fuglister, Co-director, Coalition for a Livable Future (3/23/10)</i></p> <p>"Trees are a \$5 billion dollar asset of the City and provide drainage and watershed health ecosystem services, often for a fraction of the cost of providing single objective grey infrastructure solutions....Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects, increase the energy efficiency in our buildings, reduce neighborhood crime and improve our quality of life and the livability of our city. Trees play an integral role in the success of many recently adopted city plans and programs including the Portland Watershed Management Plan, The Urban Forestry Plan, Grey to Green Initiative and the Climate Change Action Plan. Yet today protection for our urban trees is inconsistent at best." <i>Scott Fogarty, Executive Director, Friends of Trees (4/13/10)</i></p> <p>"The ecosystem value of larger mature trees is much higher than a younger and or smaller species of tree." <i>Margot Barnett (4/1/10)</i></p> <p>"I am writing to urge you to support the City Code amendments proposed in Volume 2 of the Citywide Tree Policy Review and Regulatory Improvement Project. Scientific studies have overwhelmingly shown that trees, and more specifically, their canopy, provide environmental services to urban residents that outweigh their planting and maintenance costs by orders of magnitude. The services provided by trees on private property or in public rights of way do not confer their services only upon the property owners that are responsible for them. The City of Portland should ensure through regulation and incentives that trees are protected and that optimal investment is made in the urban forest. I urge you to specifically make recommendation to City Council that would spur investment in and protect trees that grow large canopies or that provide environmental services 12 months out of the year." -<i>Garrett Phillips (3/23/10)</i></p>

<p>“[The Audubon Society of Portland, Coalition for a Livable Future and the Urban Greenspaces Institute] view a healthy urban tree canopy as a foundational piece of Portland's green infrastructure and an essential element of healthy, livable communities. Audubon has participated in the Citywide tree Project dating back to 2007 when we served on the Bureau of Planning Budget Committee and strongly urged the Planning Bureau and City Council to prioritize funding for this project. Bob Sallinger and Jim Labbe both participated on behalf of Audubon on the Stakeholder Advisory Committee for this project. We commend the Bureau of Planning for their work on this effort and strongly encourage the Planning Commission and Urban Forestry Commission to move forward expeditiously with a recommendation to Portland City Council to adopt and fund this program.</p> <p>Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects, increase the energy efficiency in our buildings, reduce neighborhood crime and improve our quality of life and the livability of our city. Trees play an integral role in the success of many recently adopted city plans and programs including the Portland Watershed Management Plan, The Urban Forestry Plan, Grey to Green and the Climate Change Action Plan. Yet today protection for our urban trees is inconsistent at best. Dramatic increases in tree planting efforts over the past decade are undermined by lack of protection and mitigation requirements for trees on much of our landscape, confusing and sometimes contradictory regulations, lack of educational outreach resources and insufficient enforcement capabilities. As older and larger trees are being lost, we are increasingly replacing them with smaller and more columnar trees which provide far fewer ecosystem services. An Urban Forestry Assessment recently completed by Audubon, Metro and PSU shows that Portland is increasingly lagging behind many neighboring communities in its efforts to protect its urban tree canopy. The proposal that is being brought forward this week will create clear, simple, consistent and comprehensive protections for our urban trees.” <i>Bob Sallinger, Conservation Director Audubon Society of Portland; Jim Labbe, Urban Conservationist, Audubon Society of Portland; Mike Houck, Executive Director, Urban Greenspaces Institute; Ron Carley, Co-director, Coalition for a Livable Future; Jill Fuglister, Co-director, Coalition for a Livable Future (3/23/10)</i></p>
<p>“I am a volunteer with Friends of Trees and believe that the tree-canopy in Portland is very important...Please support stronger protections for our urban tree canopy: Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects and improve our quality of life and livability of our city. It is critical that we protect our existing tree canopy as well as planting new trees. It takes years for a tree to grow and reach its full potential and newly planted trees are highly vulnerable... here are some clear facts which support what I just wrote: Portland has a target of 33% canopy coverage citywide. Currently Portland is at 26% canopy coverage. (Portland Urban Forestry Management Plan) For every dollar invested in tree maintenance, Portlanders receive nearly \$4 in ecosystem and economic benefits (Karps et al 2007) Replacement value of Portland trees is estimated at nearly \$5 billion (Karps et al 2007) Our urban forest currently removes 88,000 metric tons of carbon dioxide from the atmosphere each year. This equals about 1% of all local carbon emissions (Portland Climate Action Plan) Tree canopy cover over homes can reduce air condition costs by 10-15%. (Karps et al 2007) More than 200 bird species pass through Portland each year. More than 25% of those species are experiencing significant long term declines. Our urban tree canopy provides important habitat to allow many species to traverse our urban landscape. This is so important to our community, to beautify; it's good for nature, and for Portland economics!” <i>Nana Nash. M.A., Member of Audubon Society of Portland and Friends of Trees (3/23/10)</i></p>
<p>“I believe the Citywide Tree Policy Review and Regulatory Improvement Project represents a major step forward in acknowledging the importance of the city's green infrastructure, especially the role it plays in stormwater management. I urge you to move the project forward for adoption.” <i>Linda Robinson (4/13/10)</i></p>
<p>“Because trees have a positive effect on everyone - humans and wildlife, alike - they ought not be regarded as personal possessions. Instead, trees should be fiercely protected and considered green infrastructure that provide essential services. Unlike infrastructure such as sewers and roads, trees offer much more but cannot be repaired or quickly replaced. Therefore, it is imperative that trees on public <i>and private land</i> be revered and protected to the greatest extent possible.” <i>Eileen Stark, Biologist and landscape designer, Second Nature Garden Design (3/25/10)</i></p>

<p>“I have reviewed the document “Citywide Tree Project: Frequently Asked Questions” and agree with a statement made in that document that “trees increase property values.” This is based on work done by Dr. Geoff Donovan at the USDA Forest Service, PNW Research Station, that focuses on individual trees and on my own work that examines how a property’s sale price is influenced by the amount of tree canopy in its surrounding neighborhood, which I define as the area within ¼ mile of a property. In a peer-reviewed article in the May 2010 issue of <i>Land Economics</i>, I estimate the per property benefit from having 25% tree canopy coverage, the current average in the Portland area, is between \$4,600 and \$13,500. My estimates show that the per property benefit from having 35% tree canopy coverage, which is close to the stated goal of 33% tree canopy coverage, is between \$6,100 to \$14,400...A current project is looking at the combined effect of land cover and walkability using an index developed by the Bureau of Planning and Sustainability for its 20-minute neighborhood project. Results are preliminary, but we are finding an important interaction effect between land cover and access to urban amenities, that is, while property owners value access to urban amenities, and are willing to pay a premium to live in neighborhoods with these amenities, they are willing to pay even more if those neighborhoods also have tree canopy. This provides some insight into the likely effects of increasing tree density, as proposed, from 7 to 16% in areas that include commercial development.” <i>Noelwah R. Netusil, PhD, Stanley H. Cohn Professor of Economics, Reed College (5/28/10)</i></p> <p>Mr. Donovan supported the tree project based on the fundamental value of trees. He said maintenance can’t depend solely on single-family home owners because benefits of trees cross boundaries for community-wide value. He provided statistics that the total value of Portland’s street trees is \$1.4 billion, increased property tax value if \$15 million, and 312 square feet of street tree canopy is worth about \$20,000, although only 1/3 of benefits are experienced by adjacent property owners who can be responsible for the costs of street tree maintenance. He cited studies showing benefits ranging from lower cooling costs in summer to reduced chances for low-weight births. <i>Geoffrey Donovan, Economist, USDA Forest Service, – Excerpt from (3/23/10)Joint Planning and Urban Forestry Commission Minutes</i></p> <p>Response: <i>Staff appreciates this interest in and support for trees as part of the City’s green infrastructure, and for the valuable ecological, social and economic benefits that trees provide. The draft proposal, particularly the structure and content of Title 11, is intended to establish trees as a facility of sorts, with standards designed to preserve and maintain associated capacity targets. Through this approach staff hopes to help shift the paradigm in Portland from “trees as decoration or constraint” to “trees as infrastructure and a basic site development requirement.”</i></p>
<p>Native Trees and Groves</p> <p>“I especially support better protection for native trees like Oregon oak and Madrone that dominate the Willamette Bluff which ends in the St. Johns neighborhood. We have very few oak groves left from a once vigorous population on our peninsula and have had difficulty protecting what’s left. In fact it’s estimated there are only 1-2% of native oak left in the Willamette Valley due to human encroachment...Native oak are one of the highest value trees for wildlife habitat and food...Native plants evolved with wildlife so native trees are particularly important as a natural, lesser expensive aid in helping maintain both plant and local animal biodiversity. It is believed by some scientists that heat-tolerant native oaks will be able to withstand global warming better than other trees. Oregon oak are historically important in the native American culture of north Portland...” <i>Barbara Quinn, Chair, Friends of Cathedral Park Neighborhood Association (3/26/10)</i></p> <p>“I’d like to see much more emphasis on native trees, especially conifers. Native species are absolutely crucial for wildlife because they evolved together. Native fauna is highly dependent on native plants that provide food, shelter and breeding habitat. If we claim we want to help dwindling native birds flourish in our city, we must provide for their needs. Conifers are especially important and can be lifesavers after deciduous trees have dropped their leaves. In addition, they are an important source of seeds and insects and serve as excellent nest and roost sites for many birds.” <i>Eileen Stark, Biologist and landscape designer, Second Nature Garden Design (3/25/10)</i></p>

<p>"I strongly recommend that the commission advocate for more native broadleaf evergreen trees and conifers, for the following reasons: <u>Persistent leaves</u>. Because their leaves hang on during our rainy months, broadleaf evergreens and conifers are much better than deciduous trees at slowing rainfall, which results in less stormwater runoff...<u>Essential for wildlife</u>. No doubt you are aware of the grave decline of many wild bird species due to habitat loss and other man-made perils... native species, are critical to wildlife which depends on these trees to provide cover, nesting habitat and food. <u>Northwest beauty</u>. Although there are some disadvantages of growing evergreens as street trees..., they are often a beautiful choice for yards and open spaces and are an important part of the region's natural heritage and identity...I urge you to advance a substantial increase in the number of evergreen - primarily native - trees in the Portland area." <i>Eileen Stark, Biologist and landscape designer, Second Nature Garden Design (4/6/10)</i></p>
<p>"My one new recommendation would be to even more strongly stress the importance of NATIVE TREES in the new Tree Manual and any other educational material. I would also like to more emphasis on natives as street trees." <i>Mary Vogel, CNU-A, PlanGreen (4/8/10)</i></p>
<p>"Plant native trees and plan that they will be healthy trees (again a space issue and water issue). If you are requiring trees in parking lots, downtown, shopping malls, etc (which you SHOULD), plan for trees that can be REAL TREES. And make sure you have the growing space and the infrastructure to support them (leaf handling, pruning). I'd love to see douglas fir being planted." --- <i>Jo Carney (3/16/10)</i></p>
<p>"I particularly appreciate efforts to recognize the value of healthy large trees and groves of trees" <i>Margot Barnett (4/1/10)</i></p>
<p>"Grove / Stand Protection. It is not clear that protection of groves/stands is always a priority (which we believe is the intent of the project). Further, the current proposal offers protection only for the 12 inch or larger trees within the grove, not for any other vegetation in the grove. The small trees and/or shrubs that help provide the continuous cover necessary as part of a grove or a stand are subject to removal, virtually eliminating the values that make groves a priority. This issue should be revisited." --- <i>Dean Marriott, Director Bureau of Environmental Services (3/22/10)</i></p>
<p>Response: Staff recognizes the community interest in promoting the protection and planting of native trees in Portland, as well as a particular interest in native oaks and madrones. Preserving native trees is prioritized in the proposed land division tree preservation criteria and staff will be proposing additional incentives to preserve native trees through the building permit process in the next draft proposal. Staff also agrees that particular emphasis on promoting native trees should be a part of the Community Tree Manual and other educational and outreach materials.</p> <p><i>That said, the initial draft contained provisions that would have provided additional protection for smaller oaks and madrones. These provisions are proposed to be removed in the next draft proposal to simplify and reduce the cost of the proposed tree permit system. Requiring permits for native oaks and madrones 6" in diameter or larger would have substantially increased the need for staff to verify the size and species of trees proposed to be removed. Given the proposal to apply the tree permit system citywide, the limited presence of these trees outside environmental zones, and direction to simplify and reduce costs associated with the proposal, special permitting provisions for these trees (outside of resource overlay zones) are proposed to be dropped.</i></p> <p><i>The next draft will clarify that tree groves may include smaller trees and understory, and that protection of the smaller trees of the predominant native species of the grove is a priority unless thinning is required to improve the health of the grove is called for in an arborist report.</i></p>
<p>General Comments in Support</p>
<p>"As a property owner in North Portland, I write you to make clear that I support improvement of tree code policy and regulations and the protection of the urban tree canopy. I am also a member of the Audubon Society, and the npGREENWAY and Baltimore Woods coalitions, and I support the proposals of these groups to improve policy and regulations and to protect our urban trees. The cost of trying to replace this natural resource may well be insurmountable. As a property owner and taxpayer it just makes much more sense to protect these resources - and to not have to face the billion dollar cost of replacing them, not to mention the human and environmental devastation." -<i>April Boutillette Brinkman, Attorney at Law (3/23/10)</i></p>

<p>"As Executive Director of the Forest Park Conservancy, I am urging the Planning Commission to support stronger protections for our urban tree canopy: Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects and improve our quality of life and livability of our city. It is critical that we protect our existing tree canopy as well as planting new trees. It takes years for a tree to grow and reach its full potential and newly planted trees are highly vulnerable. To be effective, any tree strategy must focus first and foremost on protecting our existing tree canopy." <i>Michelle Bussard, Executive Director, Forest Park Conservancy (3/23/10)</i></p>
<p>"As one who has canopy-envy of a friend in Atlanta, let me urge you to do all you can to recommend ways to strengthen Portland's tree canopy. It's good & it's very valuable, but it's not sufficient and it is vulnerable. What I've read of the current plan seems a good start..." <i>M'Lou Christ (3/21/10)</i></p>
<p>"It is critical that we all take responsibility for trees: Tree protections should be comprehensive across all land use types and for both development and non development related activities." <i>Nana Nash. M.A. Member of Audubon Society of Portland and Friends of Trees (3/23/10)</i></p>
<p>"I am very excited to hear that Portland has been working on a revised tree code. The revisions sound good, however, the code could be made even better if it included stronger protections for our existing urban tree canopy... Our urban trees serve many important functions. Tree protections should be comprehensive across all land use types and for both development and non-development activities. Congratulations on the new proposal, and thank you for considering my comments for making it stronger." - <i>Dianne Ensign (3/22/10)</i></p>
<p>"The Tree Project proposal before you is the first step in making sure we don't recognize the importance of trees <u>after</u> we begin to see what we have lost - when we are forced to recognize how arrogant we were to believe we could adequately replace lost canopy... Please pass the Tree Project forward to Council with the strong recommendation that now is the time to recognize the urgency of beginning this new approach to trees and the need to protect and conserve their multiple values for every resident of Portland." <i>Bonny McKnight (3/23/10)</i></p>
<p>"I just want to say I'm in favor of stronger protections for our urban trees! This has been needed for a long time. Several years ago my brother and I had to sell our parents' home, and discovered there was no way to protect our mature fir trees! Fortunately, we were able to find new family who likes trees to buy our house. Portland needs stronger tree protections, for the health of our whole urban ecosystem." <i>Frodo Okulam</i></p>
<p>"I would like to say that the Southwest Hills Residential League (SWHRL) Neighborhood enthusiastically supports the proposed Tree Project in its entirety. We are so gratified that the city is incorporating suggestions for improvement of tree policies from the Southwest Neighborhoods Inc (SWNI) document created several years ago. Our tree canopy is so essential to the character of the SW Hills, and we need the best tools to protect and enhance it. We are so grateful for the hard work and dedication of the Tree Project team...We urge you to support this needed update to Portland's tree policies." <i>Nancy Seton, SWHRL Neighborhood Assn. Land Use Chair, Board Member (3/23/10)</i></p>
<p>"I am in support of the City Wide Tree Policy for a number of reasons. Just to touch on a few, [trees] help with the pollution in cleaning the air, they provide noise barriers, and they are an asset to beautify our city. There are so many more reasons and I'm sure you have heard them all but if we don't protect our trees we will be the losers in this endeavor. Obviously they can't speak for themselves but they play a major part in keeping our City green and I for one support this Tree Policy. Thank you for your time and consideration." <i>Carol Williams</i></p>
<p>"As stewards and advocates of watershed health and restoration, the Tryon Creek Watershed Council (TCWC) spends significant volunteer time and resources on projects designed to protect existing tree canopy and plant native trees. We are encouraged by the proposed Citywide Tree Project objectives and new regulatory framework... Thank you for your hard work on developing the proposal, and for the opportunity to provide input." <i>Terri Preeg Riggsby, Chair, Tryon Creek Watershed Council (3/22/10)</i></p>
<p>"Metro acquires natural areas to safeguard water quality, protect and restore fish and wildlife habitat, and also to develop regional parks and trails. Updating and clarifying existing tree regulations will better help us manage these public lands for future generations." <i>Jim Desmond, Director Sustainability Center, Metro (4/12/10)</i></p>

<p>“...worked on the SWNI Tree white paper and supports adoption of the tree code as proposed because it creates equity by requiring every property owner to participate in maintaining and improving Portland's tree canopy... Based on tree experience to date believes, at least in areas where more dense development has occurred, that the current City hodgepodge of policies related to trees is materially unfair to those individuals who are concerned and active in maintaining this resource” <i>John Gibbon (4/13/10)</i></p>
<p>“Street trees and trees on private property located in side front and back yards are the “pocket parks” for many residents who have limited or no access to city parks, at any scale. The loss of this vegetation greatly impacts the form, identity and value of these neighborhoods. The City of Portland is rapidly losing an important piece of its heritage and identity. The proposed tree policy is an opportunity, for the City of Portland, to implement a strategy / policy / codes on the ground that will support many of the lofty sustainable and green goals that are advocated ‘in the air’.” <i>Simone Goldfeder, Architect LEED AP (4/4/10)</i></p>
<p>“Trees are in a transition as to how we think about them. They have been considered decorative to a large extent, subject to only owner control, and replaceable. That limited view no longer serves the interests of our City residents. I believe we are moving into thinking of trees in terms of function. That makes canopy loss and watershed values of primary importance as we regulate and inform our actions regarding trees. It also makes the protected tree size more important to the discussion. The functional loss of tree value cannot be separated from where we live. We cannot be expected to replace those functional values elsewhere. That makes it essential to find ways to avoid the loss. Incentives for tree retention, education about tree value, information about how to protect trees and our tree canopy, and regulation that evaluates and guides unavoidable tree removal are all tools we can use. A significant part of maintaining those functional values has got to be a realistic assessment of mitigation, identification of geographical areas impacted by tree loss, and the philosophical transition of trees into the status of green infrastructure that deliver public good beyond the property on which they grow.” <i>Bonny McKnight (4/12/10)</i></p>
<p>“As a north Portland neighbor and neighborhood association chair, I completely support the Citywide Tree Policy and have long wished for a better way to protect existing tree canopy and a policy to help advocate for increased canopy.” <i>Barbara Quinn, Chair, Friends of Cathedral Park Neighborhood Association (3/26/10)</i></p>
<p>“Please support stronger protections for our urban tree canopy: Trees clean our air and water, provide wildlife habitat, increase our property values, sequester carbon dioxide, mitigate urban stormwater, reduce urban heat island effects and improve our quality of life and livability of our city. It is critical that we protect our existing tree canopy as well as planting new trees. It takes years for a tree to grow and reach its full potential and newly planted trees are highly vulnerable. To be effective, any tree strategy must focus first and foremost on protecting our existing tree canopy. It is critical that we all take responsibility for trees: Tree protections should be comprehensive across all land use types and for both development and non development related activities.” <i>Judy Todd (4/1/10)</i></p>
<p>“There is an end to Portland's significant tree skyline unless enactment of meaningful tree codes and regulations that preserve/protect trees is implemented by the City Council, and BDS along with full cooperation of all City Bureaus and interested parties. You have already heard the lists of benefits that trees provide this, or any, city. A permanent exclusion of priority or large trees from Portland forever would alter healthy livability here. Forever.” <i>Greg Schifsky (4/27/10)</i></p>
<p>“The Hosford-Abernethy Neighborhood Association (H.A.N.D.) is pleased to support the initiatives taken by the Bureau of Planning and the Forestry Division to articulate clear goals and policy directives aimed at improving urban canopy cover for the entire city. Neighbors have been frustrated by overlapping accountability, conflicting guidelines, and uneven compliance that plague the current system. By bringing all regulations and regulators together in one place, residents, businesses, developers, and other stakeholders can confidently make decisions concerning tree removal and re-planting...We feel the goals outlined in the Tree Policy Draft can be accomplished while also providing opportunities for integration of solar arrays, and that the two are not mutually exclusive, but rather parts of the City's infrastructure. In general, we believe that city policy that encourages the retention of large trees and educates residents concerning the benefits native species will enhance the livability of Portland for generations to come.” <i>Alex Bassos, HAND Chair (4/29/10)</i></p>

<p>Kina Voelz, reported that HAND's board voted to support the project. She said neighbors have been frustrated with overlapping accountability of city offices and appreciate regulations brought together in one place that will provide opportunities for preservation and replanting. She supported regulations to help reach goals and said goals for solar energy and thermal panels do not need to conflict with goals for tree canopy. She supported retention of large trees to enhance livability in Portland and the region for generations. – <i>Kina Voelz, Hosford Abernethy NA (HAND), Excerpt from (3/23/10)Joint Planning and Urban Forestry Commission Minutes</i></p>
<p>Logan Lauvray, Mt. Scott Arleta NA, emphasized the need for planting and preservation, one City number for calling about tree issues as well as a hot line that works on weekends. He supported 6-inch tree diameter for triggering a permit. – <i>Logan Lauvray, Mt. Scott Arleta NA, Excerpt from (3/23/10)Joint Planning and Urban Forestry Commission Minutes</i></p>
<p>Response: <i>General support for stronger tree regulations and the Citywide Tree Project proposal is duly noted.</i></p>
<p>General Comments in Opposition</p> <p>“...Portland, Oregon is a city of some 537,081 individuals... You see testimony of maybe less than 100 individuals regarding tree policy. That means that the majority of the population is content with the current tree policy otherwise they would be down testifying in front of your commissions or marching in the streets as we have recently see regarding police policy. We should not let the emotions of a few individuals dictate what is acceptable by the majority of the population.” <i>Jeff Fish, Fish Construction NW, Inc. (4/13/10)</i></p> <p>“The bottom line is that there is not the wanton destruction of trees in Portland as some will claim, that current policy works, and that the new tree policy is too large and complex for the Bureau of Development Service to manage. Better if we are to spend nearly two million dollars to purchase trees and let the general public add more trees to their yard if they desire.” <i>Jeff Fish, Fish Construction NW, Inc. (4/13/10)</i></p> <p>“We are not opposed to the protection and preservation of trees, but feel extensive and complex code does not properly address the numerous situations that arise with trees, particularly in employment/industrial zones. We recommend consideration of less code combined with options such as a tree manual addressing best management practices.” <i>Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</i></p> <p>“To be very clear, the Bureau of Development Services is not supportive of the draft published in February because: it is overly complex; and it will be very difficult for users, both City staff and the general public, to understand and implement.</p> <p>BDS has consistently advocated for a simple, straight-forward, and practical set of regulations... regulations that can be grasped easily by any property owner. On the continuum from simplicity to greater complexity, there are problems at both ends of the spectrum:</p> <ul style="list-style-type: none"> • the simpler the regulations, the more control of the details is relinquished, and you have a broad-brush approach that doesn't address specific situations and can be impractical or unreasonable; • the more complex the regulations, the fewer people understand them, the greater the confusion about them, and the more time-consuming and expensive the implementation, to the point that the cost outweighs the benefit. <p>For example, at the simple end of the spectrum, you could have a tree program solely requiring one-tree-for-one-tree replacement, with no exceptions... Another example of a very simple tree program would be to have a minimum tree density standard apply to every lot in the City... It is easy to understand and explain, but again, you lose some ability to prioritize which trees are more valuable compared to other trees, or how to handle situations where 100% building coverage is expected and desired, etc...the published draft is closer to the complex end of the spectrum. BDS is hoping to find something more in the middle. Finding the appropriate balance between simplicity and complexity is always challenging, as is finding the appropriate balance between flexibility and practicality for each situation on the one hand, and certainty and predictability on the other hand. BDS is committed to achieving an increase in the City's tree canopy through the collaborative development of a much simpler set of regulations and incentives.” <i>Rebecca Esau, Manager, Land Use Services Division, Bureau of Development Services (3/22/10)</i></p>

	<p>Response: Reaction to the complexity of the initial proposed draft is noted. Staff have been working with the Urban Forestry and Planning Commissions to refine and simplify the regulatory system. Moreover, project staff have been closely working with the implementing bureaus to improve upon existing systems in a way that is manageable, cost effective, and produces results to protect, preserve, restore, and expand Portland's Urban Forest.</p>
	<p>Comments regarding the process</p> <p>"The process by which the proposal was developed is fundamental to the product before you. This is not a project which used an advisory committee to tweak a fairly complete staff proposal and then send it forward. It was just the opposite, and it is a model of how to create good public policy while also building informed advocacy for it. Tree concerns came from neighborhood interest and effort. Funding for the Tree Project came from community support before Council. A stakeholder Committee was formed from all interests that would be impacted. The Committee was shown the current regulatory status of trees, provided some options for problem solving, invited to develop others, and worked out solutions generally acceptable to the Committee...The Tree Project did not intend to provide all the answers but it does focus the discussion. The elements of the Tree Project include staff support but also include responsiveness mechanisms like the 24 hour hot-line and Tree Permits to help the general public and system users understand the many roles trees play in the City." -Bonny McKnight (3/23/10)</p> <p>"DRAC has not had a chance to comment on the Portland Tree Plan" Jeffrey Paul Fish, President, Fish Construction NW, Inc. (3/23/10)</p> <p>"Because the proposal before you represents major changes to the existing city code, I understand that you are receiving a large volume of comments, with very divergent perspectives and recommendations. If there are any significant changes to the code in the current proposal, and I understand that some significant changes may be proposed soon, I urge you to undergo another round of public review and comment before making your recommendation to City Council. I realize that this re-iterative process can be time-consuming, but doing so will improve the program and be critical to public understanding and acceptance of the changes." Linda Robinson (4/13/10)</p> <p>"Given that you are receiving many comments on this project, we ask that any significant changes to the code as currently written should be submitted for public review and comment before final adoption." Jane A. Van Dyke, Executive Director, Columbia Slough Watershed Council (4/9/10)</p> <p>Need for additional public comment and involvement. Changes to the options now under consideration warrant additional public review and opportunity for public comment." BES Tree Code Option, Bureau of Environmental Services (4/27/10)</p> <p>"Given that you are receiving so many comments on this project, we request that any significant changes to the revised code as currently proposed be submitted for public review and comment before final adoption." Jean Fike, Executive Director, East Multnomah Soil and Water Conservation District (5/10/10)</p> <p>"With many private and public agencies facing limited staff resources and a relatively short period to review this public draft, we feel additional public review time is necessary to ensure unnecessary regulatory reviews and/or requirements do not occur that would add to the economic difficulties facing new development. There appears to be numerous potential situations where trees would need to be evaluated and it is difficult for us to identify all situations without thorough review of the draft code, review with City staff, and, preferably, input from development and environmental professionals. Therefore, we request consideration of an extended public review period to solicit public input/comments followed by another public hearing before this joint commission prior to the Commission making recommendations." Tom Wright, LEED AP, AICP, Principal/Director of Planning, Group Mackenzie (4/12/10)</p>

<p>“The City Staff on this project have been communicative, responsive, thorough and meticulous in not only their review of the current regulations, a ungainly task in itself, but also in working with all stakeholders in developing policies, code changes, and streamlined regulations that would benefit all parties. This effort has taken many years to get to this point and it is important that we take this next step to comprehensively address and fix many of the issues surrounding Trees in our City... SWHRL (Southwest Hills Residential League) strongly supports the adoption of the Tree Project.” <i>Jim Thayer, Southwest Hills Residential League, President (3/23/10)</i></p>
<p>Response: <i>The project proposal was released on February 16, 2010. The Citywide Tree Project Team provided a briefing to DRAC on March 11th. In addition, two open houses were held (March 9th and 16th). In response to public comment, and because the proposal was evolving through the course of several work sessions, the Planning Commission kept the hearing record open from March 23 to June 8, 2010. The Urban Forestry Commission is continuing to accept public testimony, including at its recent work session on June 17. Public comments have been submitted throughout this 16 week period. Additional public review will occur with the release of the City Council recommended draft.</i></p>

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Appendix D

**Citywide Tree Project Outreach Log
(December 10, 2010)**

Citywide Tree Policy Review and Regulatory Improvement Project Update

OUTREACH CALENDAR, INCLUDES THE FOLLOWING ACTIVITIES TO DATE:

Briefing Calendar

Project Briefing/Review	Date	# of public participants
2007		
UFMP Action Plan interbureau team	October	3 (UFC members)
Citywide Land Use Group	October 22 nd , 7:00 pm	15
Development Review Advisory Committee(DRAC)	December 13 th , 7:30 am	12
DRAC/Impact Assessment Game	December 18 th 2007 3-5pm	1
2008		
E. Portland Neighborhood Office/Coalition	January 9 th , 2008 6:30pm	11
DRAC	January 10 th , 2008, 7:30am	14
Citywide Parks Group	January 17 th , 7:00 pm	24
Columbia Slough Drainage Districts	January 24 th , 11:00 am	7
Citywide Land Use Group	January 28 th , 7:00 pm	11
SWHRL (attended meeting about history of forested SW area; discussed tree project in March)	January 30, 7:00 pm	50+
Johnson Creek Watershed Council	February 19 th 5:30pm	20
SWHRL	March 4 th , 7:00 pm	16
Group Mackenzie SDG participants	April 3 rd	2
Tryon Creek Watershed Council	April 14 th	11
BES Watershed Managers Group	May 28 th	
Commissioner Saltzman & Parks Foundation	June 30 th	4
Bridlemile Neighborhood	November 8 th	
2009		
Citywide Land Use Group	January 26 th , 7:00 pm	30
Watersheds Advisory Committee	February 11 th , 4:15 pm	14
E. Portland Neighborhood Office	February 11 th , 6:30 pm	10
DRAC	February 12 th , 7:30 am	11
Columbia Slough Watershed Council	March 17 th , 2:00 pm	1
Citywide Parks Group	March 19 th , 7:00 pm	8
Multnomah County Drainage District	April 24 th	2
Sustainability Commission	April 28 th , 2:00 pm	4
Commissioner Saltzman	June 16 th , 10:00 am	
Multnomah County Drainage District	July 30 th , 10:30 am	7
Audubon of Portland	August 5 th , 3:00 pm	2
Southwest Hills Residential League	October 21 st , 7:00 pm	
Citywide Land Use Group	October 26 th , 7:00 pm	
Partners in Community Forestry Nat'l Conf	November 10 th , 3:00 pm	65
DRAC	November 12 th , 7:30 am	20
East Portland Neighborhood Office	December 9 th , 6:00 pm	6
2010		
Commissioner Fish	January 6, 10:00 am	
Citywide land Use Group	January 7, 7:00 pm	12
Russell Neighborhood Association	February 18, 6:00 pm	5
Citywide land Use Group	February 22, 7:00 pm	13
East Portland Neighbors Park Group	March 4, 7:00 pm	6
Public Open House (West)	March 9, 7:00 pm	8
Multnomah County Drainage Dist. (dir.)	March 10, 1:00 pm	2

Citywide Tree Policy Review and Regulatory Improvement Project Update

Johnson Creek Watershed Council (dir.)	March 10, 4:00 pm	1
DRAC	March 11, 8:00 am	20
Homebuilders Association	March 11, 10:00 am	22
Audubon	March 16, 2:30 pm	2
Public Open House (East)	March 16, 6:30 pm	12
Mayor Adams	March 22, 3:00 pm	
Port of Portland	March 29, 3:00 pm	5
Columbia Slough Watershed Council	March 29, 6:30 pm	15
CNN Coalition (LUTOP)	April 5, 7:00 pm	8
Group McKenzie (conf call)	April 9, 9:00 am	2
Columbia Corridor Golf Course Reps	April 12, 10:00 am	2
John O'Shea, Arborist	April 14, 4:00 pm	1
PP&R Horticulturists	April 22, 1:30 pm	
Homebuilders Association (Mayor's Office)	April 27, 2:00 pm	7
BPS Greenbag	April 28, 12:00 pm	
DRAC	May 13, 8:00 am	15
North Portland Coalition (NPLUG)	June 21, 7:00 pm	5
Save Our Elms/ R.Ross, P. Livingston	June 28, 12:00 pm	2
Multnomah County Drainage Dist. (dir.)	July 29, 11:30 am	5
Food Policy Group Subcommittee	August 3, 4:00 pm	7
Port of Portland	August 12, 10:30 am	3
Homebuilders Association	August 12, 1:30 pm	4
Sara Petrocine (Commissioner Leonard)	August 30, 11:15am	
Jane Hansen (Design Commissioner)	September 9, 10:00am	1
Toni Anderson/Diane Bilyeu (Auditor's Office)	September 29, 4:00 pm	
Dan Jenkins/Steve Dixon, Landscape Arch.	September 30, 9:00 am	2
Amy Ruiz (Mayor's Office)	October 19, 4:00 pm	
Betsy Ames/Jim Blackwood (Commissioner Fish)	November 10, 3:00 pm	
Commissioner Fish (w/Zari Santner)	December 6, 1:00 pm	

Stakeholder Interviews	Date	# of public participants
Developers	November 28, 2007	3
Developers	January 24 & 25, 2008	3
Arborists	January 29, 30 & Feb 5, 2008	3

Stakeholder Discussion Group	Date	# of public participants
Meeting #1	March 12 th , 2008	21
Meeting #2	April 11 th , 2008	15
Meeting #3	April 25 th , 2008	15
Meeting #4	May 9 th , 2008	15
Meeting #5	May 23 rd , 2008	13
Meeting #6	June 13 th , 2008	16
Meeting #7	June 27 th , 2008	11
Meeting #8	July 11 th , 2008	11
Meeting #9	July 25 th , 2008	12
Stakeholder group with Portland Plan	August 15 th , 2008	10
Meeting #10	August 22 nd , 2008	16
Meeting #11	September 12 th , 2008	13
Meeting #12	September 26 th , 2008	10
Meeting #13	October 10 th , 2008	16
Meeting #14	October 24 th , 2008	14
Briefing	January 30 th , 2009	15
Proposal Briefing	March 3 rd , 2010	16

Citywide Tree Policy Review and Regulatory Improvement Project Update

e-mailed Project Scope for review to the following individuals and groups:

Citywide Parks Group	Friends of Trees
Neighborhood Coalitions	Individual developers and arborists
Homebuilders Association of Portland	Urban Forest Action Plan Team
Coalition for a Livable Future	Columbia Corridor Association
Audubon Society of Portland	Multnomah County Drainage District
Metro	Port of Portland
Development Review Advisory Committee (DRAC)	Columbia Slough Watershed Council
Bureau Directors Group	Johnson Creek Watershed Council
Citywide Land Use Chairs	Tryon Creek Watershed Council
Urban Forestry Commission	

Jurisdictions	Date	# of other staff
City of Beaverton	June 3, 2008	2
City of Vancouver	June 23, 2008	4
City of Tigard	May 6, 2008	2
City of Lake Oswego	March 27, 2008	3
Multnomah County Planning Staff	February 25, 2010 3:00 pm	2
Metro (Heather Nelson Kent)	April 10, 2010	1
Multnomah County Planning Staff	October 14, 2010	2
Multnomah Co. (Comm. Deborah Kafoury)	November 17, 2010	4

Commission and Subcommittee Meetings	Date	# of public participants
Urban Forestry Commission	October 18 th , 2007 7:30am	14
Urban Forestry Commission (policy cmte)	December 6 th , 2007	4
Urban Forestry Commission	February 21 st , 2008 7:30am	12
Urban Forestry Commission	August 21 st , 2008	13
Urban Forestry Commission (policy cmte)	November 14 th , 2008	3
Urban Forestry Commission	November 20 th , 2008 8:00am	10
Urban Forestry Commission	January 22 nd , 2009 8:00 am	5
Urban Forestry Commission	February 6 th , 2009 12:30pm	8
Planning Commission	February 10 th , 2009 1:30 pm	30
Urban Forestry Commission (R&R comm.)	May 20 th , 2009 9:00 am	4
Urban Forestry Commission	May 21 st , 2009 9:00 am	6
Urban Forestry Commission (R&R comm.)	May 29 th , 2009 9:00 am	4
Urban Forestry Commission	June 18 th , 2009 8:00 am	10
Urban Forestry Commission (policy cmte)	June 26 th , 2009 2:00 pm	2
Urban Forestry Commission	July 16 th , 2009 8:00 am	
Urban Forestry Commission (policy cmte)	October 6 th , 2009 10:00 am	4
Urban Forestry Commission	October 15 th , 2009 7:30 am	11
Urban Forestry Commission (policy cmte)	December 11 th , 2009 9:00 am	3
Urban Forestry Commission (policy cmte)	January 6 th , 2010 7:00 am	3
Urban Forestry Commission	January 21, 2010 8:30 am	
Urban Forestry Commission	February 18, 2010 8:00 am	10
Planning Commission Briefing	February 23, 2010 6:00 pm	12
Planning Commission Briefing (special)	March 4, 2010 10:00 am	4
Urban Forestry Commission (policy cmte)	March 15, 2010 8:00 am	3
Urban Forestry Commission	March 18, 2010 7:30 am	15
Planning Commission/UFC hearing	March 23, 2010 6:00 pm	60
Planning Commission/UFC Worksession #1	April 13, 2010 12:30 pm	30
Urban Forestry Commission	April 15, 2010 8:00 am	15
Planning Commission/UFC Worksession #2	April 27, 2010 6:00 pm	10
Planning Commission/UFC Worksession #3	May 11, 2010 6:00 pm	8
Planning Commission Worksession #4	June 8, 2010 12:30 pm	12

Citywide Tree Policy Review and Regulatory Improvement Project Update

Urban Forestry Commission Worksession #4	June 17, 2010 9:00 am	4
Urban Forestry Commission (policy cmte)	July 23, 2010 1:00 pm	4
Planning Commission	July 27, 2010 6:00 pm	
Urban Forestry Commission	July 29, 2010 8:00 am	2
Design Commission	September 2, 2010, 2:30 pm	12
Historic Landmarks Commission	September 13, 2:30 pm	8
Urban Forestry Commission Chair	October 4, 1:30 pm	1
Urban Forestry Commission	November 17, 8:00 am	9
Historic Landmarks Commission	November 22, 2:00 pm	17

Bureau Directors Meetings

Date

Bureau Directors	November 8, 2007 10:30 am
Bureau Directors	December 13, 2007 10:30 am
Bureau Directors	October 23, 2008 12:00pm
Bureau Directors	November 13, 2008 11:00 am
Bureau Directors	October 22, 2009, 9:00 am
BES Director	November 15, 2009 1:15 pm
Bureau Directors	November 23, 2009 3:30 pm
Bureau Directors	January 7, 2010 10:45 am
Bureau Directors	February 3, 2010 12:00 pm
Bureau Directors	February 19, 2010 2:30 pm
Bureau Directors	March 15, 2010 1:45 pm
Bureau Directors	April 9, 2010 2:30 pm
Bureau Directors	June 2, 2010 3:30 pm
Bureau Directors	June 18, 2010 11:00 am
Parks Director	October 15, 2010 2:00 pm
Bureau Directors	November 10, 2010 11:00 am

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Appendix E

Norway Maple Invasive Species Information

White Paper

BES Briefing

Comparison of Norway and Sugar Maple

**FREQUENTLY ASKED QUESTIONS ON
INVASIVE TREE SPECIES AND THE NORWAY MAPLE**



City of Portland Bureau of
Planning and Sustainability
Sam Adams, Mayor | Susan Anderson, Director



ENVIRONMENTAL SERVICES
CITY OF PORTLAND
working for clean rivers



PORTLAND PARKS & RECREATION
Healthy Parks, Healthy Portland

On the cover: Flagged Norway maple trees invading George Hines park, SW Portland

WHAT MAKES A TREE SPECIES INVASIVE? An invasive tree species has both the ability and the opportunity to reproduce without assistance and to outcompete native vegetation. Although many non-native species can reproduce on their own and thereby invade in the built environment, we are generally concerned with those species that are also able to invade our natural areas. Note that not all non-native plants are invasive; invasive species are those that cause (or are capable of causing) great disruption in native systems.

WHY DO SPECIES INVASIONS IN NATURAL AREAS REQUIRE ACTION?

Invasive species disrupt natural systems, compromising watershed health, impairing ecosystem function and biodiversity, and jeopardizing community livability. The consequences of such alterations to the ecosystem services we take for granted compel us to combat invasions to the extent practicable as soon as possible. There are significant costs associated with controlling and removing invasive species from natural areas. The federal government estimates that a dollar of early invasive species control work prevents \$17 of future control efforts.

- Mechanisms for Invasion:
 - Seed transport via wind, humans and animals, vehicles, yard debris removal, city leaf pick up, and water (e.g., transport via stormwater conveyance systems).
 - Runners or other direct methods of extending into natural areas.
- Life Strategy Traits:
 - Numerous traits make invasive species superior competitors, such as:
 - Frequent production of large amounts of seeds
 - Relative shade tolerance enables germination and growth in undisturbed, closed canopy conditions
 - Rapid growth and dense canopy form crowd out native species
 - Invasive species are often generalists that can adapt to a broad range of growing conditions
 - Absence of the predators (i.e., pests and pathogens). Invasive species generally can spend less energy and resources on defense against invaders, and more on spreading and propagation.

In some cases, invasive species must reach a certain level of maturity before posing a significant threat; for other species, prolific seedling regeneration alone can result in disruption to native ecosystems.

HOW WAS THE CITY OF PORTLAND NUISANCE PLANTS LIST DEVELOPED, AND HOW IS THE LIST MANAGED?

The City's Nuisance Plants List (and subsequent updates) was developed by an interdisciplinary team of horticulturalists, ecologists, and other experts from both within and outside City government. Using professional judgment, the team assembled the Nuisance Plants list based on a combination of species occurrence in Portland and the metropolitan region, evidence of invasive behavior, impacts on public health and safety, and the economic burden of controlling plant invasions.

There are many more plant species that demonstrate invasive tendencies than are included on the Nuisance Plants List. Inclusion on the Nuisance Plants List indicates a heightened level of concern that warrants action. Because our knowledge of invasive species is limited and continuously expanding, the

list is modified periodically based on best available information. In the case of Norway maple, the City joins many jurisdictions who have prohibited the propagation, sale and planting of this species.

WHY IS NORWAY MAPLE ON THE NUISANCE PLANT LIST?

Norway maple (*Acer platanoides*) has a number of traits that allow it to out-compete local natives, namely:

- **Prolific seeding** that produces numerous small trees that quickly grow to use available light resources. There are recorded cases locally where thousands of seedlings have been generated by a small group of adult trees. Like other maples, Norways have samaras which are easily dispersed by wind and runoff; however, other maples used for landscaping do not display this reproductive ability. This large amount of seed deposited in urban areas can easily be transported to the urban/wildland interface.
- **Dense canopy** that shades out other native or more desirable species.
- **Shade tolerance** allowing germination and growth in low-light, closed-canopy conditions.
- **Hardiness** and resistance to stressful conditions.



Figure 2. In 2009, more than 2000 trees were removed from George Himes park.

Dense canopy shades out understory plants and native seedlings, resulting in changes to forest structure and composition with consequences to biodiversity, habitat availability and quality, and ecosystem services.

Norway maple has long been considered invasive in mixed deciduous forests of the northeastern United States; over the past decade, recognition of the specie's invasive tendencies in the Pacific Northwest has prompted local municipalities to manage the species as a nuisance, including invasion control programs and planting bans.

Norway maple is found in natural areas throughout the City of Portland. In a 2006 Portland Parks survey of Parks-owned natural areas, 52 out of 125 properties were found to have Norway maple growing in the wild (i.e., escaped from cultivation in the built environment). While most of the 52 properties had only trace Norway maple presence at that time, a few showed large infestations, of more than 50% Norway maple in the canopy.



Figure 3. Norway maple invasion. Leslie J. Mehrhoff, University of Connecticut, Bugwood.org

Norway Maple Canopy Cover	Acres of Natural Area Affected
Trace	382.2
1% to 10%	230.2
10% to 20%	27.0
20% to 50%	6.1
50% to 75%	4.6
<i>TOTAL ACRES AFFECTED</i>	<i>650.0</i>

Table 1. Acreage and canopy cover of Norway maple in City of Portland parks, 2009.

The City manages natural areas so that natural regeneration of native species can occur; ongoing invasion from nuisance species disrupts that natural regeneration and promotes an artificial level of disturbance that can affect habitat availability and quality. Considerable City resources have been invested in sensitive natural areas such as Oaks Bottom, Children’s Arboretum, Rocky Butte, and Sellwood Park among others, to reduce the influx of Norway maple seedlings. The Watershed Revegetation Program spends about \$20,000 each year on Norway maple eradication. These economic costs of controlling Norway maple are amplified by the costs of biodiversity loss and habitat disruption and degradation.

By reducing the availability of planting spaces for nuisance species such as Norway maple, the City takes a modest step toward reducing the primary source of nuisance plant invasions: seeds. In a natural forest system, seed dispersal ranges may be relatively modest. In the urban environment, however, transportation corridors and the activities of humans and animals expand seed distribution ranges and exacerbate the nuisance plant problem.

Is Norway Maple a Suitable Street Tree?

Norway maple was once used extensively in the urban landscape as a fast growing, deciduous tree. The extensive past use of this tree, however, should not be equated with suitability as a street tree and may more reflect the ease of propagation and quick growth of the tree; Norway maple is, “...strongly objected to” by Sunset’s Western Garden Book due to the tree’s “voracious” root system, potential for sooty mold, and “sticky drip”. The characteristics that enable Norway maple to invade wildlands are often the same that can make it problematic in the urban setting.

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[or.gov/portal/server.pt/gateway/PTARGS_0_2_333086_0_0_18/InvasiveSpeciesProhibited_list.pdf](http://www.eugene-or.gov/portal/server.pt/gateway/PTARGS_0_2_333086_0_0_18/InvasiveSpeciesProhibited_list.pdf)]

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Ladd's Addition and Norway Maple

At Issue

The Citywide Tree Project (CTP), a high priority implementation action in the City's 2007 Urban Forest Action Plan, will prohibit future plantings of tree species from the City Nuisance Plant List on City property and City right of ways. The Norway maple (*Acer plantanoides*), is on this list. This has raised concerns among some residents of Ladd's Addition, who feel that the "historic character" of Ladd's Addition will be compromised if they are no longer able to continue to plant this species on public ROW's.

Background

The Citywide Tree Project proposal reflects extensive collaboration with many community stakeholders and City Bureaus and includes substantial changes to City code, including extensive updates and consolidation of existing code dealing with tree planting, maintenance, etc., into one title: Title 11 Trees. The prohibition on planting of Norway maple is consistent with and furthers the City's Invasive Plant Management Strategy, adopted by City Council in August 2009 [RN. 36726].

Some members of the Hosford-Abernathy Neighborhood Development group (HAND) (where Ladd's Addition is located) are opposed to this prohibition and have approached the City Council members informally and presented their case to the Historic Landmarks Commission; once on 9/13 and again on 10/22 (with City staff present both occasions). Following the first meeting, City staff was instructed by the Historic Landmarks Commission to work with residents to find a suitable replacement tree and make clear the City's position and the risks of allowing an exception. City staff presented to HAND in October where they disseminated both a pictorial essay and a white paper and answered questions. The suggested replacement species, sugar maple (*Acer saccharum*) already present in Ladd's, has been rejected as a replacement by some members of HAND.

Current Status

The Planning Commission and the Urban Forestry Commission approved and recommended this prohibition in late July and rejected a request from some residents of Ladd's Addition to delay or allow an exception for the neighborhood to plant Norway maples. However, the Historic Landmarks Commission decided (11/22/10) to recommend an exception for the Ladd's Addition Historic District to plant Norway maples on public ROW's, to City Council, who will address this issue when the CTP goes to Council on February 2nd.

Key Considerations

The Norway maple is a serious pest: it seeds prolifically (these seeds make their way to Portland's urban/wildland interface), produces dense shade, toxifies the soil, decreases hydrologic function (kills understory, shallow roots, etc.) and destroys native habitat. To this end, the species is now prohibited in many states and provinces, counties, and cities across North America. It is a common component of the urban forest in many cities (including Portland) and was frequently planted due to its relative hardiness and ease of production. It is, incidentally, considered a poor street tree by many authorities.

Considerable City resources have been and are being spent eradicating this species from natural areas. For example, BES Reveg. spends ~20k a year alone on eradication of this species. In PPR's 2004 survey, Norway maple was the 5th most encountered invasive in Forest Park. In 2004, Norway maple (after years of control efforts) still affected 650 acres of Parks administered land with new infestations (such as one on Mt. Tabor) discovered frequently.

The City has numerous letters from experts supporting the prohibition, letters from residents of Ladd's Addition who oppose the use of Norway maples (City staff was surreptitiously approached by one HAND member who expressed that they supported the City's prohibition on this species but that they didn't care to openly disagree with the more "vociferous" members of HAND), and the precedence of many other municipalities.

HAND counters that they are following the original Ladd's planting plan which calls for Norway maples and American elms on certain streets (incidentally, ~30% of trees in Ladd's currently don't match this planting plan). Also, as an historic district, they feel that they are supported by the National Historic Register Guidelines which acknowledge the importance of landscape materials in maintaining historic character; however, the state Historic Register office denies that this designates specific species such as Norway maples for Ladd's Addition. Furthermore, the National Historic Register is administered by the National Park Service who considers Norway maple "invasive" in the Pacific Northwest. Additionally, HAND has already planted other types of elms as their American elms die due to Dutch elm disease.

HAND has also countered that the maples in Ladd's could not be the source of the "weed trees" in natural areas. This violates well established invasion theory of how invasives spread and HAND has misrepresented some peer-reviewed literature to their end. They have 'demanded false proof' that Ladd's maples are responsible for the weed trees encountered in natural areas and have presented other logical fallacies and non-sequiturs as argument, i.e., the 'false dilemma' that there are no suitable replacements for the species. Finally, they have presented the few nurserymen and urban foresters who support their position as experts.

Conclusions

The Norway maple has been on the City's Nuisance Plant List for many years. In presenting the City's stance to HAND, City staff has described the rationale for the prohibition: the cost of invasive species control to the City of Portland, the need for unified policy, the science and ecology behind invasives in general and Norway maple in particular, and how this prohibition is consistent with the City's Invasive Plant Management Strategy.

Were City Council to approve an exception for Ladd's Addition, a precedent would be set where exceptions to City code are allowed for certain neighborhoods addressing community specific preferences. The City and its many partners (NPSO, CWMA's, Audubon, PSU, etc.) have invested significant resources and many years of effort to implement a unified policy across City programs, code and government.

Comparison of Norway Maple to Sugar Maple

Plant Habit, Summer



Norway Maple (*Acer Platanoides*)



Sugar Maple (*Acer Saccharum*)

Plant Habit, Fall



Norway Maple (*Acer Platanoides*)



Sugar Maple (*Acer Saccharum*)

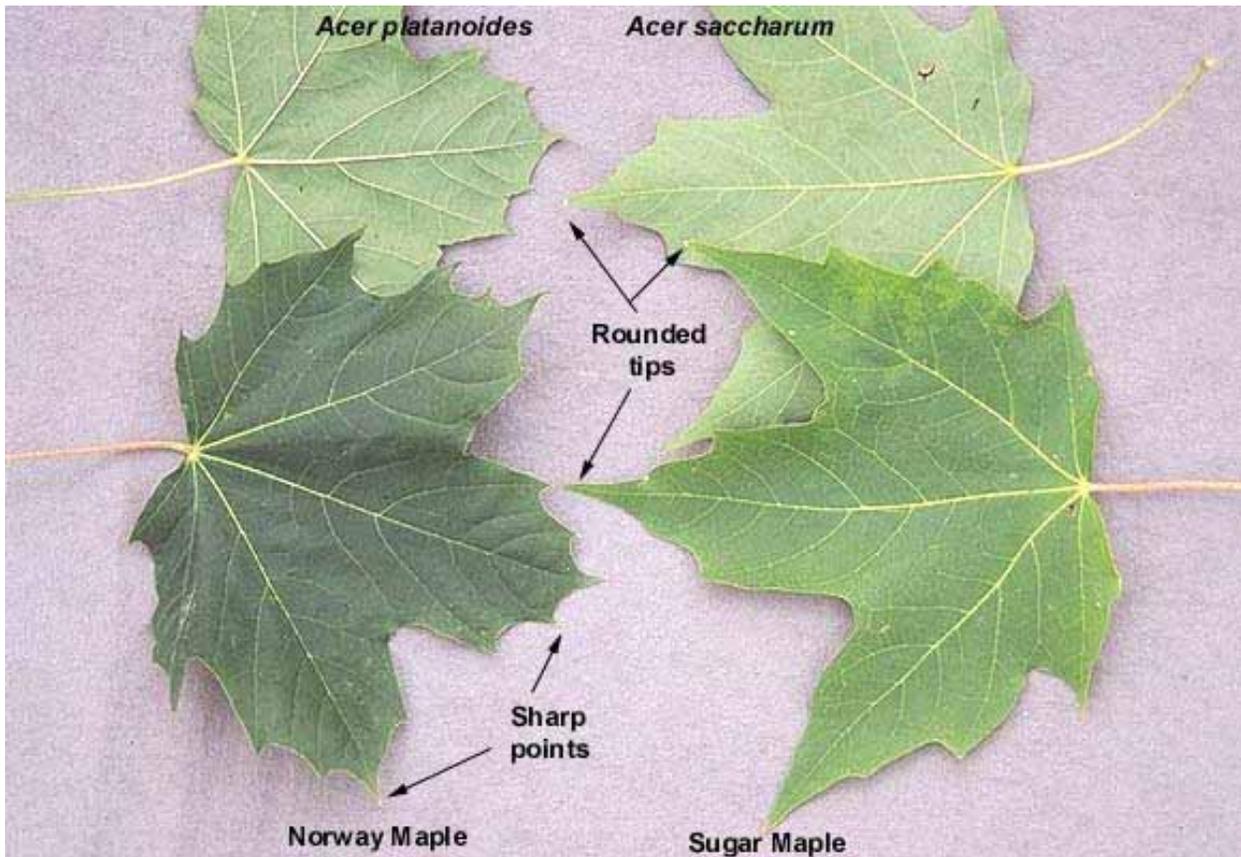
Leaves



Norway Maple (*Acer Platanoides*)



Sugar Maple (*Acer Saccharum*)



Comparison of Norway Maple/ Sugar Maple Leaves

Leaves, Fall



Norway Maple (*Acer Platanoides*)



Sugar Maple (*Acer Saccharum*)

Trunk and Bark



Norway Maple (*Acer Platanoides*)



Sugar Maple (*Acer Saccharum*)

Fruit



Norway Maple (*Acer Platanoides*)



Sugar Maple (*Acer Saccharum*)

Norway Maple

Acer platanoides • A-ser plat-an-OY-dez

- Broadleaf deciduous tree, 35-50(75) ft [11-15(23) m] high, dense foliage, broad crown, stout stems. Leaves opposite, simple, 10-18 cm across, 5-lobed, lobes pointed, glossy dark green above, also glossy below often with hairs in axils of veins, milky sap observed when petiole removed. Foliage sometimes develops an excellent yellow in fall. Showy clusters of yellow or greenish-yellow flowers in early spring, before leaves open, each flower about 8 mm diam. Large fruit, glabrous, wings wide spreading.
- Sun. Easy to transplant. Adapted to extremes in soils (sand, clay, acid, calcareous). Withstands hot dry conditions better than sugar maple. Tolerates pollution. Shallow root system may compete with turf and lift sidewalks. Over used in some areas.
- Hardy to USDA Zone 4 Native to continental Europe.
- **Caution: most selections of *Acer platanoides* produce large quantities of seeds which can germinate rapidly and crowd out native species. Although not native to North America, Norway Maples have been found in second-growth woodlands near cities, especially in the northeastern U.S.**
- Sometimes confused with *Acer saccharum*, Sugar Maple, [see comparison](#).
- There have been many selections from this species and a large number are available commercially, Dirr (1998) lists 36 and Jacobson (1996) lists over 45. Some of the more popular selections include:
 - ‘Cleveland’ - medium green, upright, oval, dense, 40 × 30 ft (12 × 9 m); yellow fall color.
 - ‘Columnare’ - dark green, narrow, upright, ascending branches, 35 × 15 ft (11 × 4.5 m); yellow fall color.
 - Conquest™ (‘Conzam’) - purplish red then dark green, columnar, 35 × 8 ft (11 × 2.4 m); red fall color.
 - [‘Crimson King’](#) - deep purple, oval, becoming rounded, 40 × 35 ft (12 × 11 m); maroon to reddish bronze fall color.
 - [Crimson Sentry™](#) - deep purple, compact, dense, pyramidal to oval, 25 × 15 ft (7.5 × 4.5 m); maroon to reddish bronze fall color.
 - [‘Deborah’](#) - reddish purple then bronze green, broadly oval to rounded, 45 × 40 ft (14 × 12 m); bronze fall color.
 - [‘Drummondii’](#) - variegated, light green with creamy white margin, broadly oval, 35 × 25 ft (11 × 7.5 m); yellowish fall color.
 - Emerald Lustre™ (‘Pond’) - medium green, upright spreading, rounded, 45 × 40 ft (14 × 12 m); yellow fall color.
 - ‘Emerald Queen’ - deep green, reddish tint in spring, dense, oval, upright spreading branches, 50 × 40 ft (15 × 12 m); yellow fall color.
 - ‘Fairview’ - reddish purple then bronze green, upright oval, 45 × 35 ft (14 × 11 m); yellow gold fall color.
 - [‘Globosum’](#) - medium green, dense, round, short and wide, 15 × 18 ft (4.5 × 5.5 m); yellow fall color.
 - Parkway®; (‘Columnarbroad’) - dark green, oval with good central leader, 40 × 25 ft (12 × 7.5 m); yellow fall color.
 - [‘Princeton Gold’](#) - bright yellow, oval, 35 × 30 ft (11 × 9 m); yellow fall color.
 - ‘Royal Red’ - deep purple, oval then becoming rounded, 40 × 30 ft (12 × 9 m); maroon to reddish bronze fall color.
 - ‘Schwedleri’ - purplish red becoming dark green, 40-50 × 40-50 ft (12-15 × 12-15 m); orange red fall color.
 - Summershade® - light green, broad, rounded, 42 × 40 ft (13 × 12 m); yellow fall color.
 - ‘Superform’ - medium green, broadly oval to rounded, 45 × 40 ft (14 × 12 m); yellow fall color.

Sugar Maple

Acer saccharum • A-ser sak-KAR-um

- Deciduous tree, 60-75(100) ft [18-23(30) m], ascending branches, upright oval, twigs of small diam. With age bark becomes furrowed, with long irregular thick plates or ridges. Leaves opposite, simple, 7.5-15 cm long and across, 3-5 lobed, narrow and deep sinuses, tip acuminate, base cordate, margin slightly coarsely toothed, generally dark green above (but variable), pale green to light green below; petiole usually 5-7.5 cm long; fall color varies from brilliant yellow, burnt orange and red tones ([a comparison with a Red Maple](#)). Flowers perfect, small, without petals, greenish yellow, on 2.5-7.5 long, thin, pedulous, stalks (pedicels), appear before leaves. Fruit are paired, winged (samara), relatively small (< 2.5 cm long), glabrous, somewhat horseshoe-shaped, matures in Sept.-Oct. Winter tree form shows long shoots, but the side shoots are not short as in Red Maple (*A. rubrum*).
- Sun to part shade. Often seen in the forest under a canopy. Prefers well-drained, moderately moist, fertile soil. Does not perform well in compacted or restricted areas. Susceptible to salt injury.
- Hardy to USDA Zone 4 Native from the Maritime provinces and southern parts of Ontario and Quebec, [New York](#), and south to Georgia, Mississippi and Texas.
- *saccharum*: Latin name for sugar cane. Maple syrup is made from the sap of this tree. About 40 liters of sap are required to make 1 liter of syrup.
- The national tree of Canada; a stylized version of its leaf is the central feature of the Canadian flag.
- Sometimes confused with *Acer platanoides*, Norway Maple

Source and photos: Oregon State University <http://oregonstate.edu/dept/ldplants/1plants.htm#acer>, accessed December 8, 2010

Appendix F

**Southwest Tree Committee
Tree Protection and Preservation in Portland
A Call for Reforms
(October 25, 2005)**

Southwest Tree Committee

Tree Protection and Preservation in Portland A Call for Reforms

October 25, 2005

The Southwest Tree Committee began meeting in March of 2005 in response to an ongoing and serious loss of trees in southwest (SW) Portland. The core committee members are Greg Schifsky, Margot Barnett, John Gibbon and Leonard Gard. Appendix 1 lists individuals who have attended one or more meeting of the committee. The committee wanted to start a dialogue in SW Portland regarding current city policies related to tree cutting and see if there were changes regulatory and non-regulatory changes that could be made to prevent the ongoing unnecessary loss of the tree assets of the city. The committee researched tree policies in Portland by inviting speakers from city bureaus to meetings as well as meeting with city representatives in person or over the telephone to gain insight into city codes, policies and actually enforcement practices. Considerable research into current urban forestry literature was done, as well as review of tree cutting ordinances from a variety of municipalities in the western United States. Since the committee began its work within the Southwest Neighborhoods Incorporated coalition we limited our review to issues that impacted trees in our area of SW Portland. We have had some dialogue with representatives from neighborhoods in other parts of the City and realize the concerns we raise are also felt by residents in other parts of the city, that tree issues have been discussed at City Wide Land Use meetings and at a meeting of the City-wide Parks Team. There are many tree preservation issues that we did not address that are important in other neighborhoods. This document is just the beginning of a needed broader citywide dialogue regarding tree preservation in Portland.

Trees perform valuable functions enhancing the beauty of our city as well as providing valuable health, and environmental benefits to residents. Tree-lined streets provide shade and serve valuable stormwater control functions. The urban tree canopy provides wildlife habitat, oxygen, lower temperatures in summer, and noise and wind protection.^{1,2} Energy savings resulting from the presence of trees help support the City's goals of sustainability.^{3,4,5} The importance of mature trees in terms of ecological function is emphasized by the fact that a mature tree may store up to 1000 times the amount of carbon dioxide than a small immature tree.⁶ This function is critical for controlling temperature and air quality. Thus retention of mature trees is critical for public health.⁷ There are even some indications that vegetation including high canopy trees can reduce crime.⁸

The committee has focused on tree losses that directly or proximately result from human activities on private property. Examples are the intentional cutting of trees, or the death of trees from construction or post-construction abuse. These losses occur because of

inadequacies in regulations and public education. Our purpose is to address those inadequacies.

The Portland area continues to grow and change with more residents moving here from out of state. While individuals often move here because of the ecological amenities the area has to offer, they need to be educated on how to help maintain our green infrastructure. Growth results in an increase in impermeable surfaces and the addition of curbs and sidewalks in areas of the city that have not had these types of improvements in the past. As part of the concept of sustainable development we must work to find ways prevent economic incentives for development and the need for housing from overriding the need to preserve our valuable tree assets. Mitigation and penalties do not instantly restore the lost aesthetic and ecological functions when a mature tree is cut down. Although many mitigation and revegetation activities by volunteer groups, non-profits and the city bureaus have helped to curtail the loss of native tree canopy we are concerned that the habitat and quality of the canopy are still under threat with the existing system of protections.

A variety of human activities adversely impact trees besides cutting trees, decreasing pervious soils and surfaces, and damaging tree root zones during development. Some examples include the unnecessary and extreme cutting or pruning of trees especially when done outside of the dormant season (December, January, February), not protecting root zones by parking vehicles over root zones, storing soil, firewood, bricks, etc. over root zones, incorrect pruning practices, failing to water large trees after the water table (below grade) has dropped (usually in early August for any year), contour grading during a landscape project impacting root zones especially during dry months. Another serious threat to trees such is the spread of invasive species which is also related to human activities since we often plant invasive species, and they grow more easily in soils disturbed by development. While many of us are also working to address invasive species threats, they are outside the scope of this committee's work. (We certainly encourage the city look further a developing policies across all bureaus that consistently work to prevent the spread of exotic and invasive plant, insect and animal pests).

As stated earlier, we are aware that the issues identified here have impacts elsewhere in the city. There may be other issues that we have not identified due our focus on our area of southwest Portland we may have missed issues related to differing types of terrain and development in other areas of the city. We would like to continue to work on these issues on a citywide basis with partners from city bureaus and other neighborhood coalitions.

The problems that we felt we could address with that are related to existing codes and policies are those directly related to the cutting of trees and preservation of trees. Trees are cut at different stages in the use of land:

1. When land is developed or re-developed with a land division or new construction.
2. During pre-development or post-development occupation and use of the land.

Examples of problems we have seen in southwest Portland include the following:

- Inadequate tree preservation plans
- Inadequate tree protection zones
- Lack of enforcement of the required tree preservation plans
- Lack of enforcement of other regulations
- Need for public education and outreach regarding the role of trees.

Background of Current Regulations Pertaining to Tree Preservation

There are several city agencies that have regulatory responsibility related to trees; the Bureau of Planning is the bureau that develops policy and is responsible for writing new regulations and modifying existing regulations in Title 33, the Bureau of Development Services (BDS) Land Use Services division implements the zoning code. Urban Forestry in Portland Parks and Recreation regulates street trees, trees on public property, some trees on private property such as heritage trees, historic trees, and trees at least 12 inches diameter on dividable lots not currently proposed for land division. They coordinate with Portland Department of Transportation on issues related to streets and street trees. The Bureau of Environmental Services also impacts tree preservation within the city through the Stormwater Management Manual, Watershed Management Plans and Revegetation Program. The Watershed Management Plan that will be submitted for comment this fall may also inform and influence tree preservation regulation once it is adopted. It is not clear what the process will be for integrating that document into the City’s regulatory framework.

Our committee calls for three reforms: A) changes to city code and procedures, B) an expanded and invigorated tree liaison program, and C) a program of education and incentives for tree preservation. Issues which were identified as needing resolution, but where no specific reforms are suggested are included in section D.

Proposed Reforms

A. Changes to city code, interpretations of city code, and procedures

1. Individual lot owners must receive notice when their lots are subject to preservation plans.

If homeowners are unaware that a tree plan exists it will most likely be violated, making the plan inadequate. The plans are complex and difficult to enforce, and therefore inadequately enforced. City Code Section 20.42.050.A provides in part that “Trees may be cut on unregulated property without a permit except where the tree proposed to be cut: 1. Has been expressly protected through an applicable land use regulation or required to be preserved as a condition of approval; ...”

Tree preservation plans in fact are conditions of approval in land division cases, and 33.630.200.C provides in part that “Trees to be preserved on individual lots must be permanently preserved through a tree preservation plan, ...”

It is clearly the intent that tree preservation plans be permanently in effect, and yet there is no framework for notifying individual lot owners of their responsibility. It is important that individuals are aware of constraints on cutting of trees prior to purchasing property. Owners are cutting trees that should be protected sometimes out of ignorance of the tree's protected status. There is also no clear definition in the code of what *permanent* means. It should be stated that trees must be replaced at the end of their natural lifespan. The city tree guide should have some guidance in it for each species regarding the average lifespan for each species.

Methods of getting notice to lot owners:

- Add some information currently in the GARTH system into the data and mapping system accessible to the public (heritage trees, significant trees) and add a field to indicate whether a tree plan exists for the site;
- Consider affixing 'permanent' metal tags to all trees protected by tree preservation plans.
- Ensure that individuals are given a disclosure form that indicates the zoning code(s) and other regulations in effect on a property for sale within the City of Portland. This form should provide clear instructions on how to use the City of Portland BDS website to determine what additional zoning regulations apply to the property in question, and if applicable, how to obtain documents such as tree plans and stormwater management facilities. The coversheet should include information on how to obtain the information without web access such as requesting the information by telephone, in writing or in person for a small fee. A similar coversheet should be attached to all title reports for properties sold within the City of Portland. We recognize that requiring this type of a disclosure form or fact sheet may require some legal changes. We feel that when homebuyers are aware of restrictions prior to purchase they are less likely to violate codes once they purchase property. Individuals moving to Portland from other areas are often unaware of the types of zoning codes and development restrictions that may impact the ability make changes to property.

2. All tree preservation plan options must include some protection of significant trees.

The current code allows tree preservation plans that are inadequate in that they do not protect significant trees. The concept of the "significant tree" is an important one in the tree preservation chapter (33.630) of the land division code. The existence of a single significant tree triggers application of 33.630 to a land division. A significant tree is a) a tree more than 20 inches in diameter that is not a nuisance or prohibited plant or b) a tree belonging to one of 18 tree species that are significant at varying diameters less than 20 inches. While defining *significant trees* the provisions of the chapter fails to adequately protect them.

Chapter 33.630 gives the land division applicant five different options for preserving trees. Option 1 requires the applicant to preserve at least 35 percent of the total tree diameter on the site but does not require the applicant to preserve a single significant

tree. Options 2, 3, and 4 give the applicant incentives to preserve significant trees by lowering the percentage of total tree diameter to be preserved. Option 5 focuses on tree canopy for sites larger than an acre. A final option is to do mitigation in lieu of preserving trees.

Nearly all land division applicants are choosing option 1, the option that doesn't require protection of significant trees. Option 1 needs to be modified to protect some percentage of the significant trees.

3. Modify codes with prescriptions or incentives so that more builders choose to preserve trees rather than cut and plant.

It is too easy to cut mature trees within the current land division and development system. Chapter 33.248.020.H.2 applies to new residential development. It gives builders three options for meeting tree requirements. Option 1 requires some trees on site to be preserved. Option 2 allows all the trees on site to be cut but requires replacement plantings. Option 3 allows payment into a tree fund when preservation or plantings are not practicable.

In practice, builders are not choosing Option 1. They are cutting the trees and planting new trees that are poorly monitored and have high mortality rates. The code should be changed to favor more preservation, either through incentives or prescriptive rules. This Chapter should be amended to include incentives for preservation of *significant trees* as noted for the land division code in item 2 above.

4. Trees selected for preservation must be adequately protected during construction and given adequate root protection zones.

Monitoring is insufficient to ensure that current root zone protections and construction practices are sufficiently protective of trees. More protective practices used in other jurisdictions with substantive tree protection program should be considered for adoption (such as Lake Oswego, OR (Ch.55.08.030) or City of Palo Alto, CA⁹), combined with active monitoring of tree protection in Portland, can be used to ensure that code reflects 'best management practices' for preserving trees. Updated protections and monitoring, enforcement when practices are not adhered to, incentives for preservation, and replacement of trees when trees die following development are key to protecting the urban forest canopy. For example, rigid chainlink fences may be more effective than the permitted flexible fencing. There should be a tickler system for random selection for inspection at 3 years after the final inspection to determine if protected and preserved trees are alive. This is an area where partnering with the tree liaison program, watershed councils, Master Gardener and other stewardship programs maybe helpful in providing some additional resources.

5. Without a good tracking and monitoring system the existing codes are not protective due to an inability to enforce and evaluate the efficacy of the codes.

There is not easy way to obtain statistics on violations of all aspects of tree cutting and tree preservation. Without this it is difficult to evaluate the effectiveness of the

code in preventing inappropriate tree cutting or preserving trees. As mentioned in item 3 above, we need to develop a systematic approach to evaluate whether the root protection zones are adequate, and what areas of the code are most problematic. This information can be linked with tree inventories of public and private trees to evaluate the program. It is not clear how enforcement can be at optimally effective if the data system is insufficient to easily track the permitting, inspection and violation process.

6. BDS staff should be able to challenge arborists report claiming exemption of trees from preservation under Chapter 33.630.030 to ensure that tree protection plans are truly protective.

This code section exempts dead, diseased, and dangerous trees from protection “as determined by the City Forester or an arborist.” Arborists in practice are liberal in determining that trees should be exempted, and the above language puts BDS staff in a weak position to challenge an arborist’s determination. The exemption of trees by an arborist should be challengeable by BDS staff. A consulting arborist should be available to resolve conflicting assessments of tree health and hazard status if one is unavailable on BDS staff.

7. Portland needs a residential certificate of occupancy (COO) to provide better tools for enforcement and ensuring compliance with tree protection, landscaping and tree planting required as part of the development process.

The requirement for a residential COO was deleted from the city code in 2002. A certificate is required for commercial buildings and change of occupancy for commercial and mixed use buildings. By not requiring a COO there are minimal incentives or enforcement mechanisms to make sure that inspections are completed and all of the permit requirements especially those not associated with building codes, are met. Builders can sell houses and homeowners can occupy homes before a final permanent erosion control measure inspection is done, thus there are limited incentives for ensuring that the work is completed. The data system and resources for enforcement are insufficient to track whether work is completed and to check on landscape certification forms that are received. This issue is particularly problematic since the COO is still referenced in 20.40.070G. “All trees required by this Section must be planted prior to the issuance of a certificate of occupancy.”¹⁰

8. Protection should be consistent within the city codes for ease of public understanding and to ensure that the tree canopy is preserved as infill occurs and the city reaches full built capacity within the established zoning.

Current regulations in the different bureaus are not consistent with regards to the criteria used to determine which trees should be protected. For consistency and to meet the goals of the urban tree preservation it would be helpful to have Chapter 20 apply to all *significant trees* as defined in Chapter 33 and remove the exemption for fully developed lots that do not have existing tree plans. (This would require a change in the definition of regulated property under 20.42.020, as well as changing the purpose of the tree cutting regulations to align them more with the Urban Forestry Plan and sustainability goals. This change will help ensure that the goals and requirements of land use regulations of Title 33 are met. Note that Clearing, Grading

and Erosion Control 24.70.020 would also need to be reviewed and modified to achieve consistency.) This approach would avoid confusions related to differing tree diameters that trigger protection in BDS zoning and land division compared to the diameters protected by Urban Forestry, while ensuring that native species and large specimens of non-native species are adequately protected. (BDS protects trees at least 6 inches diameter at breast height (DBH), Urban Forestry at least 12 inches DBH.)

This is just one possible solution to resolve the noted inconsistency and provide an equal level of protection of trees on properties in the city while simplifying the permit process for property owners.

9. The code that governs permits for clearing, grading and erosion control (24.70.020) is unclear and contradictory in how it addresses cutting trees.

Wording of this section of code makes it difficult to understand how it fits with other codes governing tree cutting. It describes that a tree cutting permit is needed for operations where slopes in whole or in part exceed 25%. The permit is needed if the area to be cleared is or when 5 or more trees of six-inch diameter are going to be cut. This section of code does not refer back to 20.40.040 requiring a permit for cutting all trees at greater than 12" DBH.

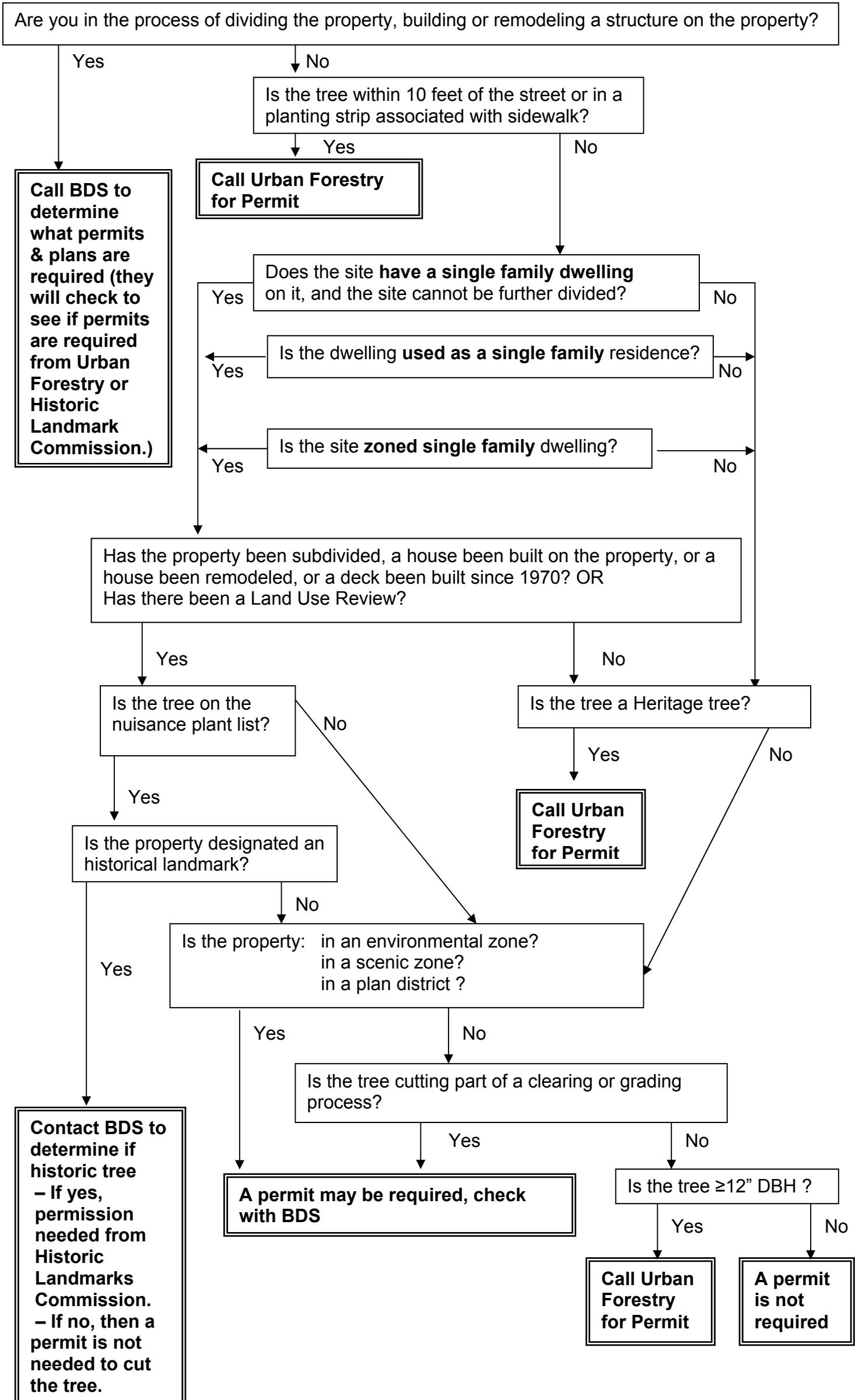
10. When mitigation is required under section 20.42.100 there are requirements (C) that the replacement tree must live for three years after planting or be replaced, and must not be cut without a permit. A system to tag and track trees required for mitigation must be developed otherwise this is requirement is unenforceable.

There are no clearly established mechanisms to track these trees which are supposed to have some form of permanent protection. Trees required as mitigation must be put into a centralized data system, and homeowner must be made aware of the tree's protected status as described in item A.11., below. The mitigation requirements under this code are different than those in the zoning code Chapter 33.248. The requirements in 20.42.100 should be reviewed to determine if the two chapters can be made consistent.

11. Currently individuals who want to determine if they need a permit to cut a tree on their property must call several bureaus, or actually visit the permit center. Information on tree cutting regulations is not available from a centralized source, either by telephone or the internet. There is no way from the internet to determine if there is a tree plan recorded for a particular property. As part of increasing public education, awareness and providing easy mechanisms for compliance a central repository of information is needed

The complexity of the current scheme that a property owner must use to determine: a) if they need a permit to cut a tree on their property; and b) which bureau has jurisdiction, is shown in Figure 1. The city needs an easily accessible and well-publicized central repository of information on tree regulation, preservation, and

Figure 1: I want to cut a tree on my property, do I need a permit?



planting. The Bureau of Development Services should be the steward of that repository since they currently enforce a majority of the regulations and maintain the permit center which should be a one stop office for permits providing information to the public. Permit requests that should be provided by Urban Forestry can be routed to them rather requiring residents to call multiple offices or wade through the wording of the tree ordinance to determine which code applies. Planting guidelines from all bureaus should be integrated into a single document.

BDS should have a tree hotline that gives the public a single place to go to for information and complaints. Complaints can then be routed to the appropriate office similar to the way PDOT routes calls to the 823-SAFE number.

Website information should:

- a) Lead viewers through a decision matrix to encourage tree preservation and replacement and clarifies which regulatory process and permit applies if tree removal or cutting is needed (The same matrix should be used to respond to telephone inquiries.)
- b) Provide instructions on how to identify whether a tree preservation plan, heritage tree designation, historic landmark tree designation, tree protection required for violation mitigation applies to a particular property
- c) Link to other sources of information, such as Portland Maps for environmental and scenic zone overlay information.
- d) Describe the city's regulations relating to trees and vegetation.
- e) Describe the tree liaison program and give contact information.
- f) Include information and/or give links to related subjects such as naturescaping and invasive vegetation management..

12. The handouts and website from Urban Forestry are unclear and lead individuals to determine early on, that their property is “unregulated” when they actually may fall under zoning codes. Simplify and update handouts from Urban Forestry.

Give citizens one phone number to call. Brochures that advise the reader to call other bureaus or to read an ordinance to determine if they are covered tend to alienate the public and result in people just going ahead and cutting, since it is too hard to figure out if a permit is needed and where to get it.

13. Apply a consistent approach to trees on both private property and public property

BDS, BOP, PDOT, and Urban Forestry should cooperate to make sure the city has a consistent approach to the planting, preservation, and cutting of trees, whether on private property, in the street, or on other public property.

14. All code language should specify tree diameters rather than circumference, which is more easily measured and recordable by property owners.

While we recognize the measurement of tree size as diameter at breast height (DBH) is standard in forestry and landscaping it is not readily understood by some

homeowners and requires an extra computational step or use of special measurement tools. Current code explains how to measure DBH in terms of the vertical height on the tree, and how to manage when there are multiple leaders, but nowhere is there an explanation of how to measure diameter. If DBH remains as a standard of measure then there should be an explanation of how to calculate diameter or describe tools and methods to be used. (See Appendix 2 as an example.) To make the measurement simpler for the lay public, and not require computation we suggest providing circumference measurements in parentheses. For large and complex tree plans we would expect standard tools to be used to determine diameter at breast height, but for determining whether a permit is needed to cut a single tree it seems that providing a circumference should be adequate.

15. Violations and recurrent violations should be dealt with in a tiered system similar to the recently adopted (August 24, 2005) changes to the Environmental Zone Codes.

We feel very strongly that the City should reexamine the practice of citing the property owner only for tree cutting violations. This is particularly true when examining the issue of topping trees, and/or cutting protected trees. There should be a tracking system to monitor landscaping and arborist services and other contractors that repeatedly violate these protections with increasing penalties.

16. Anecdotal information indicates that topping and cutting of trees to obtain and maintain views is one of the common violations of tree preservation and tree cutting ordinances. The city should develop a best management practices standard for this type of pruning.

We suggest that the city provide guidance on the best methods for pruning and structuring trees to provide and maintain a view. A standard could be a useful tool to help preserve trees and enforce the prohibition of topping. Existing standards such as the ANSI A300 Standard and the ISA Tree Pruning Recommendations might be a good starting point. Developing this standard should include input of Urban Forestry, BDS and other partners from the arborist community. It should be available to the public through various outreach programs including home and garden shows. This information should also be provided to industry contacts as noted in item 3b. Guidance should include cost information about penalties for violations related to illegal cutting and topping, including the costs for required long term professional pruning correction for topped trees.

17. Integrate information to prevent urban wildfires into the code and planting guidelines.

Information on fire-resistant species and the fire-resistant index of tree species should be integrated into the landscaping and planting guidelines from the city for areas that are particularly vulnerable to urban wildfire. This will require coordination between Portland Fire Bureau, the Bureaus of Planning, Development Services and Parks and Recreation. A column indicating fire resistance of tree species could be added to the Tree and Landscape Manual, and information on fire resistance should be added to

the Portland Plant list. This information could be made available at home and garden shows and nurseries.

18. Code should be clear and consistent regarding management of tree on property lines.

All sections of code where this is a pertinent issue (land division, rights-of-way, undeveloped and fully developed sites, street trees) should be clear and consistent.

19. Evaluated and amend code to require revegetation for areas cleared of nuisance trees and invasive plants, when there are no significant trees present.

There may be times when areas are cleared of nuisance trees and invasive plants leaving an area devoid of vegetation and open to significant erosion. The code should require revegetation when areas are cleared and no ground cover or trees remain.

20. To strengthen the City's commitment to tree preservation and green infrastructure code should reinforce the need for flexibility and innovative solutions to preserve existing mature trees when new streets and sidewalks are developed or existing sidewalks are being damaged by mature trees.

Citizens at times have to struggle with conflicting messages from City bureaus relative to the development and maintenance of sidewalks. There should be flexibility to encourage the use of alternative approaches to preserve trees. Inclusion of language similar to that below in appropriate code sections would encourage the development and use of alternate approaches.

When new sidewalks and street improvements are designed the City Engineer should consult with the City Forester to preserve as many significant trees as possible using innovative design methods and materials for sidewalk and street construction.

Where sidewalk or curb damage due to tree roots occurs, every effort shall be made to correct the problem without removing or damaging the tree. The City Forester shall be responsible for developing or approving corrective measures in consultation with the City Engineer.¹¹

21. The City should institute a 24 hour Hotline violation number that is tied to an on-call inspector to respond to violations of tree cutting (and other development codes) that occur on weekends and after working hours.

Anecdotal information indicates that violations of tree cutting (and other development codes) frequently occur on weekends, when there are no mechanisms for getting an enforcement action. (While there may be some established mechanisms for code enforcement outside of usual business hours, the protocols are not publicized and are not clear among all of the partner city agencies. Therefore, whatever protocols might exist they are not effective enforcement tools.) Since cutting a tree is not an action that can be undone a mechanism to provide rapid response outside of regular working hours would help prevent loss of valuable resources.

22. Public notice should be given of applications to cut trees in the right-of-way.

Recently, in the West Portland Park neighborhood, housing went in on a site that was subdivided sometime in the past, perhaps many years ago. Therefore, the current development was done with administrative permits without public notice or review. The development included the cutting of trees in the public right-of-way. PCC 20.42.110B provides for notice to the affected neighborhood coalition when an applicant applies for a tree cutting permit on private property. PCC 20.40.100 should be amended to give similar notice to the affected neighborhood association and/or coalition when permits are sought to cut trees in the public right-of-way. Cuts in the public right-of-way can be as or more significant than cuts on private property, and because the right-of-way is publicly owned, the public has a clear interest.

B. Enhance the Tree Liaison Program

Develop an enhanced tree liaison program to ensure that citizens understand the resources in the community that are available to help them plant and maintain tree cover on their own property and within their neighborhoods.

The tree liaisons can function as mediators and information resources on planting and maintenance of street trees, tree preservation in areas without sidewalks, and tree preservation on private property. The current tree inventory program should be expanded to include methodology for collecting data on trees in public rights of way where there are no sidewalks and curbs. In depth information on tree codes and enforcement processes will be part of this comprehensive program. Linkages with resources for homeowners needing assistance with tree identification, maintenance, ivy removal and fall leaf removal will be part of the program.

Provide neighborhood associations with an annual updated list of active trained tree liaisons within their neighborhood boundaries to insure the integration and use of the tree liaisons at the neighborhood level. It would be helpful to have the tree liaisons come to a neighborhood association meeting after they complete training to introduce themselves to association members and to let them know of any specific projects or interest they have related to trees in the neighborhood.

While some tree liaisons may choose to be involved in specific planting or inventory projects others may choose to serve as citizen resources related to tree-related codes, tree identification and to help provide linkages for tree preservation, and ways to obtain assistance for leaf cleanup and pruning for low income residents. In depth training should be provided to meet these needs.

C. Other Education and Incentive Programs

The regulatory program is insufficient without additional educational and incentive programs to ensure that the public and professionals that provide services such as landscaping, gardening and tree removal are all aware of the benefits of preserving mature trees, the codes, and the consequences of not following them. Programs should be developed that encourage the preservation of trees through incentives. We are making

some suggestions here with the understanding that other approaches may be more effective and sources of funding need to be identified. Some of these activities can be carried out by non-profit organizations or other city partners.

1. Develop a ‘CALL before you cut ‘ outreach program

This program would be similar to the “call before you dig” program for utilities. Ads could be placed in phone books, Business Service Directories, Home Shows, Farmer’s Markets, local newspapers, web sites, and other locations where the public would look for tree cutting services. Information should include warnings about costs if they cut first without checking.

2. Educate arborists, tree specialists, landscapers, and gardeners regarding codes/regulations related to tree preservation.

This can include outreach to professional associations, professional training programs, office of licenses and the State Contractors Licensing Board. Coupled with education about code should be education and encouragement for arborists, gardeners and landscapers to educate clients regarding the benefits of tree preservation - a repeat tree customer is better than just taking a tree down once.

3. Create a city/environmental welcome basket for new homeowners that introduces them to city information, identifies their neighborhood association and coalition, city services, and provides educational materials regarding trees, tree values, naturescaping, etc.

4. Tree cutting violation fees should be put into the Tree Fund established under 33.248.H.c. The uses of the fund described in 33.248.H.c.(1) should be expanded to include: ivy removal programs, educational programs like Naturescaping and cost sharing mechanisms for replacement trees for low-income homeowners.

5. Create incentives for removal of ivy and other invasive plant species

D. There were four issues identified as needing resolution, but where no specific reforms were suggested or examined to our satisfaction. These are included here to stimulate broader city-wide discussion.

1. Cutting trees to create views

For years, property owners have cut trees to create views. Sometimes they cut trees on their own property. Sometimes, with or without permission of the owner, they cut trees on other private or public lands. Sometimes they seek city permits, sometimes not. City code and policy validate public views, but our code is silent on the issue of whether private views are a legitimate use that justifies cutting protected trees. In one recent case, the city granted environmental review approval for tree cutting to create a view, and declined to address the issue of the use. LU 04-002118 EV EN. In a process that includes a public discussion, the city needs to address and resolve this matter.

2. Loophole in scopes of 33.630 Tree Preservation and 33.248 Landscaping and Screening that does not adequately protect trees.

There are cases where a developer will build first, and later apply for a land division, which lets them avoid the rules in 33.630 during development. This issue should be examined to determine if there is a way to integrate 33.630 and 33.248 to protect trees better by preventing this from happening.

3. Updating and amending tree preservation plans

Tree preservation plans primarily address conditions at the point in time when the plan is approved. But plans can become out of date as time passes; trees mature and die naturally, and new trees and vegetation arise through natural processes and human intervention. A discussion is needed on what should happen to plans when they reach a certain age, say ten years. One idea is to have an expedited amendment process to update plans.

4. There may be insufficient resources to enforce tree regulations.

The SW Tree Committee is concerned that BDS and Urban Forestry will not have the resources to enforce regulations related to trees. The city must determine the resources needed for effective enforcement of tree preservation codes. We need to determine if consolidating responsibility for tree protection within one bureau would be a more effective regulatory approach.

¹ Portland Parks and Recreation, Portland Urban Forestry Management Plan 2003. March 2004. Portland Parks and Recreation, Portland, OR

² United States Department of Agriculture. Benefits of Urban Trees, Forestry Report R8-FR 71, United States Department of Agriculture Southern Region. Sept. 2003.

³ City of Portland. Sustainable Infrastructure Report. 2001. City of Portland, December 2001.

⁴ Sacramento Municipal Utility District (SMUD). Tree Benefits Estimator. Accessible on the American Public Power Association's website. <http://www.appanet.org/treeben/default.asp> Accessed on August 10, 2005.

⁵ McPherson, G.E., Maco, S.E., Simpson, J.R. et. al., 2002. Western Washington and Oregon Community Tree Guide: Benefits, Costs and Strategic Planting. Center for Urban Forest Research, USDA Forest Service, Pacific Southwest Research Station, Davis, CA. 2002.

⁶ Environmental Protection Agency 2005. EPA: Heat Island - What Can Be Done - Trees & Vegetation, <http://www.epa.gov/heatisland/strategies/vegetation.html>, Accessed on August 19, 2005.

⁷ Frumkin, H. 2001. Beyond toxicity: Human health and the natural environment. Am J Prev Med 20(3):234-240.

⁸ Kuo, FK and Sullivan, WC Environment and Crime in the Inner City. *Environment and Behavior* 33(3):343-367 (2001).

⁹ Tree Technical Manual City of Palo Alto, Palo Alto Municipal Code Chapter 8.10.030. June, 2001 First Edition. Department of Planning and Community Environment. Pages 1-5, 6 and Chapter 2.

¹⁰20.40.070 Planting of Trees. (Amended by Ordinance Nos. 163739, 173534 and 176955, effective October 9, 2002.) http://www.portlandonline.com/auditor/index.cfm?cce_28635_print=1&c=28635
Accessed on 5/12/2005

¹¹ Bernhardt, E. A., Swiecki, T.J. 1999 Guidelines for developing and evaluating tree ordinances. Research. Prepared for: Urban Forestry Program, California Department of Forestry and Fire Protection, Sacramento, CA.

Appendix 1

SW Tree Committee Core Members

Margot Barnett
John Gibbon
Greg Schifsky
Leonard Gard

Additional individuals who attended one or more meetings

Rich Adelman
Neil Blatner
Micki Carrier
Jayne Cronlund
Tim Cushing
Lillie Fitzpatrick
Steve Mullinax
Susan Murray
Victor Von Salza

Appendix 2

Tree Measurement



Extension FactSheet

School of Natural Resources, 2021 Coffey Road, Columbus, Ohio 43210

Measuring Standing Trees Determining Diameter, Merchantable Height, and Volume

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Woodland owners often need to measure the merchantable board-foot content (termed “volume”) of certain trees in their woodland. In order to sell timber, for example, an estimate is needed of the quantity to be sold. If trees are to be cut to provide lumber, an estimate of volume is needed to determine what size and how many trees to cut. Using the methods described in this article, a woodland owner can estimate the board-foot volume in one or several trees. If an estimate is needed for several acres, however, it is recommended that the woodland owner engage the services of an Ohio Department of Natural Resources Division of Forestry Service Forester, a consulting forester, or an industry forester. Methods needed to accurately and efficiently inventory timber volume on large areas are beyond the scope of this publication.

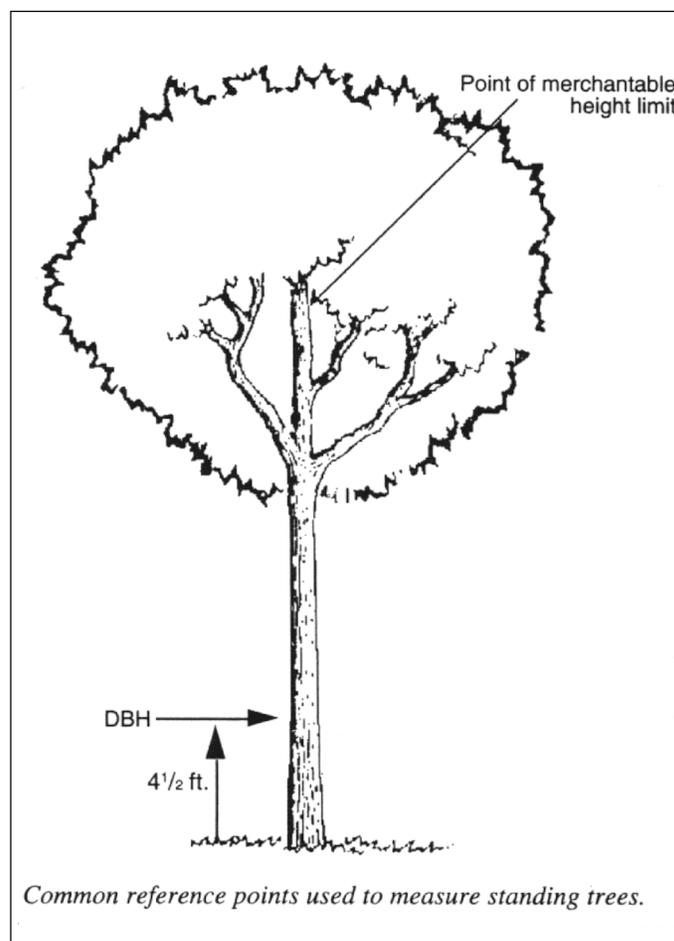
Tree Volume Estimation

In the United States, the most common measure of lumber volume is the board foot, defined as a piece of wood containing 144 cubic inches. It can most easily be visualized as a board 12 inches square and one inch thick ($12" \times 12" \times 1" = 144$ cubic inches). However, any piece of wood containing 144 cubic inches is a board foot (e.g., $3" \times 4" \times 12"$; $2" \times 6" \times 12"$; etc). The board-foot content of any board may be determined by multiplying the length by the width by the thickness, all expressed in inches, and dividing by 144 cubic inches.

The board foot is also the most common volume measure for trees and logs to be used for lumber and veneer. The board-foot volume of a tree or log is an expression of the number of board feet of lumber that can be cut from that tree or log. The lumber volume that can be cut from a tree or a log depends on a great many variables, including how the tree is cut into logs, the dimensions of the lumber, how much of the log is lost in sawdust and waste, and the efficiency of the sawmill and workers. Because of these variables, the board-foot volume of a tree or log cannot be measured exactly but is estimated.

Numerous methods (called “rules”) have been developed to

estimate board-foot tree volume. Two board-foot volume rules are commonly used in Ohio, the Doyle and the International 1/4-Inch rules (Tables 1 and 2). Both of these rules provide an estimate of the board-foot content of a tree based on tree-trunk diameter breast high and merchantable tree height (discussed later). The Doyle rule is the most common rule in Ohio. It is used



by the timber industry and many professional foresters. The International 1/4-Inch rule is used by state agencies and the U.S. Forest Service.

A comparison of these two volume tables will show that they are not identical. The International 1/4-Inch rule is generally considered to be the best estimate of the amount of lumber that can actually be sawn from a tree or a log under optimum conditions. The Doyle rule substantially underestimates the volume of trees in the smaller diameter classes. The International 1/4-Inch rule should, therefore, be used when the most accurate estimate of yield is important, as when determining how many trees to cut to obtain a specified amount of lumber. When marketing timber stumpage, however, the choice of volume rule is less critical. Confusion on quantity should not arise as long as both buyer and seller know which rule was used to estimate volumes. Timber stumpage prices are commonly adjusted based on which rule is used.

Measuring Tree Diameter

Tree-trunk diameters are measured at breast height (termed diameter at breast height or DBH), defined as the diameter of the tree 4-1/2 feet above ground on the uphill side of the tree. If a tree forks below breast height, each trunk is treated as a separate tree. DBH can be measured with a tree caliper, a Biltmore stick, a tree diameter tape, or a flexible measuring tape (e.g., cloth or steel). Tree calipers, Biltmore sticks, and tree-diameter tapes can be purchased through forestry equipment supply companies. The flexible measuring tape can be used to measure tree trunk circumference and circumference divided by 3.14 to determine diameter.

Measuring Merchantable Height

Merchantable height is the height of the tree (or the length of its trunk) up to which a particular product may be obtained, usually minus a one-foot stump height. Merchantable tree heights for sawlogs and veneer are generally estimated to the height where the trunk diameter tapers to 10 inches, or until heavy

branching or defects are encountered. The merchantable height of very valuable trees, such as veneer black walnut, may be measured to the nearest foot or two feet. The merchantable height of most other trees is measured in units of 16-foot logs and 8-foot half-logs. Merchantable height measurements are rounded to the nearest half-log. Thus, a tree with a merchantable height of 42 feet would be measured as having 2-1/2 logs of merchantable height.

Merchantable heights may be measured with a number of special instruments designed specifically for tree-height measurements such as clinometers, altimeters, relascopes, or hypsometers. These instruments are available through forestry equipment supply companies. Merchantable heights can also be measured with a long pole if only a few trees are being measured and they have relatively short merchantable heights. With some practice, merchantable heights in log and half-log units can be estimated quite accurately, particularly for trees with short merchantable heights.

Using the Tables to Estimate Merchantable Tree Volume

Once the diameter at breast height and the merchantable height of a tree have been measured, Table 1 or 2 may be used to estimate its volume in board feet. For example, a 20-inch DBH oak tree with a merchantable height of 2-1/2 logs contains 260 board feet Doyle rule or 350 board feet International 1/4-Inch rule.

When using these tables, it is important to remember that only that portion of the trunk that will produce a useable product should be measured. Portions of the trunk or entire trunks that are hollow, excessively crooked, rotten, etc., should not be measured. You may hear foresters or buyers talking about gross and net volume. Gross volume is the estimated tree volume without deduction for defects (i.e., the DBH and merchantable heights of all of the trees were measured ignoring defects, volumes were determined, and the volumes were added up). Net volume is the estimated tree volume with proper deductions made for defects.

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TDD No. 800-589-8292 (Ohio only) or 614-292-1868

2/2002-jaf

Table 1. Standing Tree Board Foot Volumes — Doyle Rule

Dbh (inches)	Number of 16-Foot Logs							
	1/2	1	1-1/2	2	2-1/2	3	3-1/2	4
	Board Feet							
12	20	30	40	50	60			
14	30	50	70	80	90	100		
16	40	70	100	120	40	160	180	190
18	60	100	130	160	200	220	40	160
20	80	130	180	220	260	300	320	360
22	100	170	230	280	340	380	420	460
24	130	220	290	360	430	490	540	600
26	160	260	360	440	520	590	660	740
28	190	320	430	520	620	710	800	880
30	230	380	510	630	740	840	940	1,040
32	270	440	590	730	860	990	1,120	1,220
34	300	510	680	850	1,000	1,140	1,300	1,440
36	350	580	780	970	1,140	1,310	1,480	1,640
38	390	660	880	1,100	1,290	1,480	1,680	1,860
40	430	740	990	1,230	1,450	1,660	1,880	2,080
42	470	830	1,100	1,370	1,620	1,860	2,100	2,320

From: Ashley, Burl S. 1980. *Reference handbook for foresters*. USDA NA-FR-15. 35 pp.

Table 2. Standing Tree Board Foot Volumes — International 1/4-Inch Rule

Dbh (inches)	Number of 16-Foot Logs							
	1/2	1	1-1/2	2	2-1/2	3	3-1/2	4
	Board Feet							
12	30	60	80	100	120			
14	40	80	110	140	160	180		
16	60	100	150	180	210	250	280	310
18	70	140	190	240	280	320	360	400
20	90	170	240	300	350	400	450	500
22	110	210	290	360	430	490	560	610
24	130	250	350	430	510	590	660	740
26	160	300	410	510	600	700	790	880
28	190	350	480	600	700	810	920	1,020
30	220	410	550	690	810	930	1,060	1,180
32	260	470	640	790	940	1,080	1,220	1,360
34	290	530	730	900	1,060	1,220	1,380	1,540
36	330	600	820	1,010	1,200	1,380	1,560	1,740
38	370	670	910	1,130	1,340	1,540	1,740	1,940
40	420	740	1,010	1,250	1,480	1,700	1,920	2,160
42	460	820	1,100	1,360	1,610	1,870	2,120	2,360

From: Ashley, Burl S. 1980. *Reference handbook for foresters*. USDA NA-FR-15. 35 pp.

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Appendix G

**Portland Urban Forest Action Plan
(February 2007)**



PORTLAND PARKS & RECREATION

Healthy Parks, Healthy Portland



Urban Forest Action Plan

February 2007

Urban Forest Action Plan

February 2007

Accepted by City Council March 15, 2007

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This document was reviewed by staff from the Water Bureau, Portland Development Commission, and Portland Parks & Recreation City Nature zone managers.



PORTLAND PARKS & RECREATION

Healthy Parks, Healthy Portland

www.PortlandParks.org

Commissioner Dan Saltzman • Director Zari Santner



Introduction



This action plan was developed to implement the goals established in the *2004 Portland Urban Forest Management Plan*. That plan's Executive Summary reminds us of the need for a healthy urban forest in our community, and the City's role in maintaining it:

“The urban forest surrounds us and contributes to the quality of our daily lives. It provides environmental, psychological, and economic benefits ranging from improved air and water quality to savings from decreased heating and cooling costs to aesthetically pleasing neighborhoods and increased resale values. It is vital to our efforts to restore fish and wildlife habitat and it provides countless opportunities for recreation and refreshment.

... “Without care and attention, a healthy urban forest cannot exist. The decisions we make now and the consequences of our actions determine how well or poorly the urban forest will function in ten, twenty and fifty years.”

The plan summarizes the variety of benefits that trees provide to our community.

Environmental benefits:

- Provide wildlife habitat
- Decrease erosion
- Decrease flooding
- Protect biodiversity
- Recharge groundwater
- Manage stormwater
- Improve air quality
- Reduce greenhouse gasses/combat global warming

Social benefits:

- Provide shade
- Provide a wind break
- Improve mental and physical health
- Improve neighborhoods
- Reduce heat islands
- Create visual and sound buffers

Economic benefits:

- Reduce cooling costs
- Increase property values
- Reduce flood damage
- Reduce engineered infrastructure needed for stormwater management
- Draw business and tourism

The 2004 plan identified the Urban Land Environments noted below and set tree canopy targets for some of them. Canopy is the area occupied by the crowns of all trees, as seen from above. New analysis using 2002 multispectral images provides information about canopy conditions that was not available when the plan was written.

Urban Land Environment	Target Canopy (2004 Plan)	Current (2002) Canopy
Residential	35-40%	30%
Commercial/ Industrial	15%	7%
Developed Parks and Open Spaces	30%	28%
Rights-of-way	35%	17%
Natural Areas and Streams	-----	79%
Overall Canopy	-----	26%

ABOUT THE ACTION PLAN

Recognizing the City’s responsibility to reach the goals of the 2004 *Management Plan*, the following *Action Plan* was developed by an interbureau committee to ensure attainment of the goals and recommendations of the 2004 *Management Plan*. Members of the team that developed the action plan included staff from:

- Portland Parks & Recreation
- Bureau of Planning
- Bureau of Environmental Services
- Bureau of Development Services
- Office of Sustainable Development
- Portland Department of Transportation

GOALS

The three goals of the *Action Plan* are the primary goals of the 2004 *Management Plan*.

Actions:

The prioritized actions of the action plan can be done by City of Portland bureaus, although achieving all of the plan's goals will require participation from private organizations, individuals, and other public agencies. Additional city resources will be required to fully realize the city's vision for the urban forest.

NEXT STEPS

- An expanded interbureau committee, with representation from the Urban Forestry Commission and community groups, will meet quarterly to coordinate and monitor progress. One of the first tasks will be to develop performance measures.
- The Urban Forestry Commission will report annually to City Council on implementation progress.



Westmoreland Park



South Waterfront Park

Summary of Goals and Actions

DRAFT ACTION PLAN GOALS AND OUTCOMES

Goal 1: Protect, preserve, restore, and expand Portland's urban forest.

- **Outcome A: Enhanced Canopy**
The tree canopy is optimized, meeting stocking and canopy targets.
- **Outcome B: Regulatory Program**
The City has a comprehensive, consistent and clear regulatory program for trees.
- **Outcome C: Development**
The Urban Forest is enhanced through development and redevelopment.

Goal 2: Develop and maintain support for the urban forest.

- **Outcome A: Shared Stewardship**
Stewardship of the urban forest is shared by residents, agencies, and non-governmental organizations (NGO's), and businesses.
- **Outcome B: Public Education**
The public has a strong awareness of tree benefits and ecosystem health issues; education opportunities are abundant.
- **Outcome C: Stable Resources**
Stable resources support the urban forest.



Kenton neighborhood before and after

Goal 3: Manage the urban forest to maximize community benefits for all residents.

• **Outcome A: Street Tree Distribution**

Street trees are equitably distributed throughout the city.

• **Outcome B: Livability**

The urban forest contributes to the health and wellbeing of Portlanders.

• **Outcome C: Watershed Health**

The urban forest contributes to improved watershed health, including water quality, stream flow, floodplain function, habitat, and biological communities

DRAFT ACTION PLAN KEY TERMS

- **Priority:** the importance of the action in accomplishing the outcome under which it is listed. Items may be high priority actions but may lack resources or specific work plans.
- **Time Frame:** when the action will or could be initiated or accomplished.

Selected current actions are examples of current programs that have recently been initiated or are proposed for significant expansion.

Early actions can be initiated or accomplished within two years with existing or identified resources.

Five-year and ten-year actions could be initiated within those time frames if so directed and funded through the City's work planning and budget process.

- **Lead:** identifies the coordinating or responsible bureau for a particular action.
- **Support:** bureaus or organizations that serve as minor or major participants.



Johnson Creek Park

GOAL 1

PROTECT, PRESERVE, RESTORE, AND EXPAND PORTLAND'S URBAN FOREST

Goal 1 - Outcome A: Enhanced Canopy

Tree canopy is optimized, meeting stocking and canopy targets.

Selected Current Actions

- Assess street, right-of-way, and park tree status (quantity, type, condition) through standardized sampling.
Lead: Portland Parks & Recreation
- Track numbers of street and right-of-way trees permitted to be planted and removed.
Lead: Portland Parks & Recreation
Note: Tracking began in 2006
- Continue and increase programs to plant trees throughout the city.
Lead: Portland Parks & Recreation, Bureau of Environmental Services
Note: Additional resources would augment current effort.
- Reevaluate tree management, especially pruning by utility companies. Develop collaborative effort to better ensure the health of trees near utility lines.
Lead: Portland Parks & Recreation
- Continue work of the established interbureau team to coordinate actions and monitor progress toward Urban Forestry Plan Goals
Lead: Portland Parks & Recreation
Support: Bureau of Planning, Bureau of Development Services, Bureau of Environmental Services, Portland Department of Transportation, Office of Sustainable Development

High Priority Actions

Early actions

- Adopt tracking system to periodically evaluate overall city tree canopy.
Lead: Portland Parks & Recreation
Support: Bureau of Environmental Services, Office of Sustainable Development, Sustainable Development Commission, Coordinating Committee
Note: Performance measures to be adopted by interbureau committee
- Develop standard performance measures for determining city-wide urban forest quality (e.g. diversity, tree health, appearance).
Lead: Portland Parks & Recreation, Bureau of Environmental Services
Note: Performance measures to be adopted by interbureau committee
- Evaluate current city programs for effectiveness in preserving older trees. Look for new opportunities and approaches.
Lead: Portland Parks & Recreation
Support: Bureau of Planning
- Develop additional methods to promote trees that are appropriate for their location and optimize urban forest benefits (e.g., broad canopy, native, or evergreen trees where appropriate, discourage columnar and pest prone species; maximize shade and stormwater interception).
Lead: Portland Parks & Recreation
- Review and Revise current approved list of street trees, incorporating, where appropriate, additional large, evergreen and native trees.
Lead: Portland Parks & Recreation

Five-year Actions

- Complete Assessment of street tree planting opportunities (stocking level).
Lead: Portland Parks & Recreation
Note: Based on completed street tree inventory
- Restore and expand City maintenance of designated street trees.
Lead: Portland Department of Transportation
Support: Portland Parks & Recreation
Note: Funding has been reduced in recent years; fewer street trees are now maintained by the City.
- Develop a regular maintenance schedule for street and park trees.
Lead: Portland Parks & Recreation, Portland Department of Transportation
- Develop and adopt standards and Best Management Practices (BMP's) for selection, purchase, planting, and care of urban trees.
Lead: Portland Parks & Recreation
- Train city employees who work on or around trees on adopted tree care standards.
Lead: Portland Parks & Recreation
Note: Based on development and adoption of standards
- Develop quality tree care training program for arborists and landscapers.
Lead: Portland Parks & Recreation

Medium Priority Actions

Early actions

- Design green streets to coordinate with street tree requirements and opportunities.
Lead: Bureau of Environmental Services, Portland Parks & Recreation
Support: Portland Department of Transportation
- Consider urban forest condition and potential in site planning for new and existing parks.
Lead: Portland Parks & Recreation

Five-year Actions

- Work with Oregon Department of Transportation (ODOT) to plant and maintain trees on state highway rights-of-way.
Lead: Portland Parks & Recreation, Bureau of Environmental Services
Note: Expand existing efforts into a larger program.
- Adopt tracking system to evaluate number of trees approved for planting and removal through development permit review.
Lead: Bureau of Development Services
Note: Current systems do not capture or allow tracking of this information.
- Explore the possibility of the City managing all street trees.
Lead: Portland Parks & Recreation
Note: Currently, adjacent property owners are responsible for most street tree planting and care.

Ten-year Actions

- Conduct full street tree inventory and update on a regular basis.
Lead: Portland Parks & Recreation
- Upgrade City-owned parking lots, by planting trees, to meet current standards.
Lead: Portland Parks & Recreation, Bureau of Environmental Services, and others



Columbia Park

Goal 1 - Outcome B: Regulatory Program

The City has a comprehensive, consistent and clear regulatory program for trees.

Selected Current Actions

- Continue to implement process and code "quick fixes" that promote the goals of the *Urban Forest Management Plan* such as the Regulatory Improvement Code Amendment Package (RICAP) for the zoning code, and other bureau specific efforts.
Lead: Bureau of Planning, Portland Parks & Recreation, Bureau of Environmental Services, Bureau of Development Services
Note: Each City Title has its own process for code amendments.

High Priority Actions

Early actions

- Review and amend mitigation requirements in Title 20 for tree removals.
Lead: Portland Parks & Recreation
Support: Bureau of Environmental Services

Five-year Actions

- Review and clarify city goals and policies relating to topics such as tree preservation, tree removal and replacement, tree planting, trees for wildlife habitat, tree species and age diversity, and trees as part of the city's green infrastructure. Update the Comprehensive Plan as necessary to reflect city adopted policies relating to trees, such as the *Urban Forest Management Plan*, the *Portland Watershed Management Plan*, and *Sustainable Development Principles*, and to address policy gaps as determined during the policy review.
Lead: Bureau of Planning
Support: Portland Parks & Recreation, Bureau of Environmental Services, Portland Fire and Rescue, Portland Department of Transportation, Office of Sustainable Development
Note: This item may require a separate scoping phase, and must be coordinated with code review.

Action Plan



Maricara Natural Area

- Review codes (including incentives) and processes (including enforcement) related to tree preservation, removal, and planting for internal clarity and consistency with city policy and other (city, state, fed) mandates.
Lead: Bureau of Planning
Support: Bureau of Development Services, Portland Parks & Recreation, Bureau of Environmental Services
Note: This item may require a separate scoping phase. To be coordinated with policy review.
- Revise tree-related codes, administrative rules, standard operating procedures (SOP's), memoranda of understanding (MOU's) etc. for clarity and consistency
Lead: Bureau of Planning, Portland Parks & Recreation, Bureau of Development Services
Support: Bureau of Development Services
Note: Based on code review action
- Ensure compliance with tree planting requirements and construction-related tree protection as part of site or building permit inspection.
Lead: Bureau of Development Services

Medium Priority Actions

Five-year Actions

- Ensure compliance with tree preservation requirements as part of site or building permit inspection
Lead: Bureau of Development Services

Goal 1 - Outcome C: Development

The Urban Forest is enhanced through development and redevelopment.

Selected Current Actions

- Continue to develop and provide clear and simple information for customers during development permitting process.
Lead: Bureau of Development Services, Portland Parks & Recreation
Note: Expand current program
- Continue to develop and enhance design information and technical assistance for developers (commercial, industrial, and residential) and residents on tree protection, planting, and maintenance.
Lead: Bureau of Development Services
Note: Expand current programs

Medium Priority Actions**Early actions**

- Develop awards program for innovative projects that protect existing trees or provide new trees during development.
Lead: Portland Parks & Recreation

Low Priority Actions**Five-year Actions**

- Explore options for methods to notify new property owners of existing land use review (LUR) requirements such as tree preservation.
Lead: Bureau of Planning
Support: Bureau of Development Services

Ten-year Actions

- Develop a system to facilitate access to tree preservation plans from land use reviews.
Lead: Bureau of Planning
Support: Bureau of Development Services

GOAL 2

DEVELOP AND MAINTAIN SUPPORT FOR THE URBAN FOREST

Goal 2 - Outcome A: Shared Stewardship

Stewardship of the urban forest is shared by residents, agencies, and non-governmental organizations (NGO's), and businesses.

Selected Current Actions

- Educating property owners about their responsibilities for the care of street trees.
Lead: Portland Parks & Recreation
Support: Bureau of Environmental Services
Note: Expand program currently in progress through Neighborhood Tree Liaison Program
- Providing financial and technical support to community and non-profit groups engaged in planting and maintenance of trees.
Lead: Portland Parks & Recreation, Bureau of Environmental Services
Note: Expand current programs

Medium Priority Actions

Five-year actions

- Outreach to and coordination with state and federal agencies to encourage proper tree establishment and maintenance procedures.
Lead: Portland Parks & Recreation
Note: Based on standards to be developed (see Goal 1)

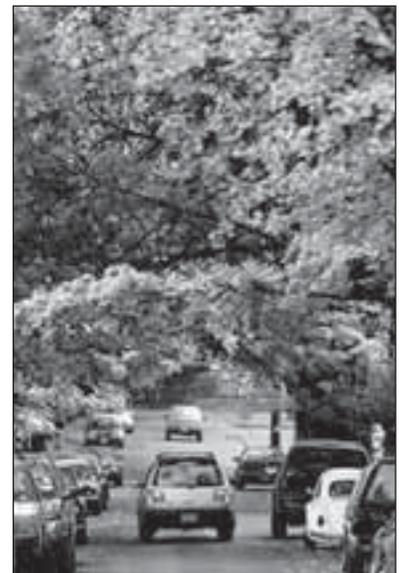
Goal 2 - Outcome B: Public Education

The public has a strong awareness of tree benefits and ecosystem health issues; education opportunities are abundant.

High Priority Actions

Early actions

- Establish website with information about trees and tree care, and links to regulations.
Lead: Portland Parks & Recreation
Support: Bureau of Environmental Services, Bureau of Development Services, Office of Sustainable Development
- Develop materials about tree benefits, care and regulations to be disseminated by realtors.
Lead: Portland Parks & Recreation
- Augment Neighborhood Tree Liaison Program to include more neighborhoods, additional training and support.
Lead: Portland Parks & Recreation
- Present annual report to City Council from Urban Forestry Commission, and post on website.
Lead: Urban Forestry Commission, Portland Parks & Recreation
Support: All
- Assess environmental and social benefits from Portland's public trees.
Lead: Portland Parks & Recreation
Note: Based on standardized sampling of public trees (see Goal 1)
- Disseminate Information about the benefits/ services provided by the urban forest and the status of the urban forest.
Lead: Portland Parks & Recreation
Support: Office of Sustainable Development, Bureau of Planning
Note: Based on benefit assessment



Street trees bring beauty to Portland's neighborhoods

Medium Priority Actions

Five-year Actions

- Promote research on urban forest topics and disseminate results (e.g. analyzing trends in land use and effects on the urban forest).

Lead: Portland Parks & Recreation

Support: Bureau of Planning

Note: Coordinate with academic institutions

Goal 2 - Outcome C: Stable Resources

Stable resources support the urban forest.

High Priority Actions

Early actions

- Increase funding to enhance tree planting in city parks.
- Work with corporate sponsors to contribute funding for urban forestry tree and maintenance activities.

Lead: Portland Parks & Recreation

Medium Priority Actions

Five-year Actions

- Incorporate tree establishment and long-term maintenance into all appropriate capital project plans

Lead: Portland Parks & Recreation, Bureau of Environmental Services, Portland Water Bureau, Portland Department of Transportation, Bureau of Planning.

GOAL 3

MANAGE THE URBAN FOREST TO MAXIMIZE COMMUNITY BENEFITS FOR ALL RESIDENTS OF THE CITY

Goal 3 - Outcome A: Street Tree Distribution

Street trees are equitably distributed throughout the city.

High Priority Actions

Early actions

- Target low income neighborhoods for street tree planting.
Lead: Portland Parks & Recreation
Note: Continue existing efforts; establish formal prioritization system

- Target neighborhoods with lower canopy for street tree planting.
Lead: Portland Parks & Recreation
Support: Bureau of Environmental Services
Note: Continue existing efforts; establish formal prioritization system.

Medium Priority Actions

Five-year Actions

- Develop neighborhood tree planting plans through neighborhood tree liaison program.
Lead: Portland Parks & Recreation



Oaks Bottom Wildlife Refuge

Goal 3 - Outcome B: Livability

The urban forest contributes to the health and well-being of Portlanders.

High Priority Actions

Early actions

- Coordinate tree-related actions from the City's plans such as Natural Hazard Mitigation Plan, Local Action Plan on Global Warming, Portland Watershed Management Plan.
Lead: Portland Parks & Recreation
Support: Bureau of Environmental Services, Bureau of Planning, Portland Fire and Rescue, Portland Department of Transportation, Bureau of Development Services
Note: Coordination through Interbureau Committee.

Five-year Actions

- Augment leaf removal and composting capacity
Lead: Portland Department of Transportation
Support: Bureau of Environmental Services

Medium Priority Actions

Five-year Actions

- Support planting of food-producing trees in appropriate locations.
Lead: Office of Sustainable Development



Leach Botanical Garden

Goal 3 - Outcome C: Watershed Health

The urban forest contributes to improved watershed health, including water quality, stream flow, floodplain function, habitat, and biological communities

Selected Current Actions

- Reducing extent of invasive weed problem.
Lead: Portland Parks & Recreation, Bureau of Environmental Services
Note: Expand and coordinate existing programs

High Priority Actions

Early actions

- Develop an integrated strategy for compliance with Metro's Nature in Neighborhood (NIN) program and the Total Maximum Daily Load (TMDL) requirements (e.g. for water temperature).
Lead: Bureau of Planning, Bureau of Environmental Services
Support: Portland Parks & Recreation, Bureau of Development Services
Note: Identify the role of the urban forest in the compliance strategy.
- Implement revegetation (tree planting) actions specified in Portland Watershed Management Plan.
Lead: Portland Parks & Recreation, Bureau of Environmental Services
- Increase canopy and shade in natural areas and along streams.
Lead: Portland Parks & Recreation, Bureau of Environmental Services
- Develop specific canopy targets, where appropriate, by land use and watershed.
Lead: Portland Parks & Recreation, Bureau of Environmental Services, Coordinating team

Five-year Actions

- Implement integrated strategy (described above) using regulatory and non-regulatory tools.
Lead: Bureau of Development Services, Bureau of Environmental Services, Portland Parks & Recreation
Note: Based on developed compliance strategy above

Medium Priority Actions

Five-year Actions

- Revise Portland Plant List (PPL) native and nuisance lists periodically.
Lead: Bureau of Planning
Support: Bureau of Environmental Services, Portland Parks & Recreation, Portland Fire and Rescue.
- Develop concept plans for “nature spots” for parts of the city deficient in access to nature: areas of native trees and understory shrubs in appropriate locations in parks.
Lead: Portland Parks & Recreation, Bureau of Environmental Services

Ten-year Actions

- Increase canopied areas around large open recreational spaces in developed parks.
Lead: Portland Parks & Recreation, Bureau of Environmental Services



Westmoreland Park

Appendix H

Citywide Tree Project Newsletters

Spring 2008

Winter 2009



Spring 2008



It Began With a Seed of a Plan

Visit the website:

www.portlandonline.com/planning/treeproject

Send an email:

BOPCTP@ci.portland.or.us

Write a letter:

Bureau of Planning
c/o Tree Project
1900 SW 4th Ave.
Suite 7100
Portland, OR 97201-5350

Call us:

(503) 823-7700
(503) 823-6868 TDD

The Citywide Tree Project will reach across City bureaus and into the community to establish effective and consistent regulations relating to trees in Portland. Not all the solutions will rely on regulatory tools however. Other solutions will be considered including programmatic incentives, administrative restructuring, procedural enhancement, improved enforcement and educational outreach.

This project has its origins in the Portland Urban Forestry Management Plan (UFMP). The UFMP, issued in 2004, provides direction for the maintenance and improvement of Portland's urban forest. The UFMP identifies various obstacles to the continued health and management of the urban forest. One important

obstacle is the City's current regulatory framework. Increasingly complex tree rules and regulations make the development process confusing and difficult to coordinate.

In 2006, a committee representing multiple city bureaus was formed to ensure that the goals and recommendations of that plan were actualized. Specific actions, including the Citywide Tree Project, were outlined and assigned priority and timelines for completion based on their need and available funding. The Urban Forest Action Plan was accepted by City Council on March 14, 2007.

Citizens and neighborhood groups convinced the City Council that it was important



How will the city ensure a vibrant and healthy urban forest is maintained, now and in the future?

to address the City's tree policies and regulations. Council responded by funding the first year of the two-year project, and directing the Bureau of Planning to lead the project in close collaboration with the Bureau of Development Services, Portland Parks and Recreation and the Bureau of Environmental Services. 

By the numbers...

- The City of Portland has an estimated 236,000 street trees.
- Tree canopy covers 26% of the city. The Urban Forest Management Plan goal is 33%.
- The environmental benefits provided by the entire urban forest canopy exceed \$38 million per year.
- The replacement value of the entire urban forest is estimated at \$5 billion.

Getting to the Root of the Solution

Trees intersect with a number of City titles and bureau priorities, as well as state and federal mandates relating to environmental quality and watershed health. As new city regulations were adopted to address specific issues, these changes were not always coordinated with other rules or

bureaus. Consequently, the regulations have become disjointed and difficult to administer. Citizens, applicants and staff alike find the rules confusing.

The Citywide Tree Project is a major component of achieving Goal 1 of the Urban Forest Action Plan: to "Protect,

Preserve, Restore and Expand Portland's Urban Forest." The goal is served by three specific outcomes:

- Optimize the urban forest canopy.
- Develop "a comprehensive, consistent and clear regulatory program for trees."

(Continued on page 2)

Getting to the Root of the Solution

(Continued from page 1)



Trees and development can coexist, with careful site planning and meaningful regulations.

- Enhance the urban forest "through development and redevelopment."

Comprehensively assessing the current regulatory and policy framework relating to trees will address each of these desired outcomes. The project team has developed a list of issues that the project will address. These issues fall into five general topic categories: Policy, Code Conflicts, Tree Preservation, Site Design and Implementation.

Existing city policies will support and guide the Citywide

Tree Project. The project will also make recommendations to inform Portland's larger policy plan update (The Portland Plan).

The Citywide Tree Project will evaluate the strengths and shortcomings in the current regulations and propose ways to revise and integrate the codes to work more consistently and seamlessly with each other.

Conscientious site planning and tree preservation as part of development and redevelopment projects have great potential for integrating existing and new trees to help

meet urban forest canopy targets.

Site design and tree protection methods will be explored to enhance the urban forest. However, the most carefully crafted preservation measures are ineffective if they are not adhered to in the field before, during and after construction.

This project will examine improvements to implementation, through enforcement tools, permit review, inspection processes and educational opportunities.



**To exist as a nation,
to prosper as a state,
and to live as a people,
we must have trees.
-Theodore Roosevelt**

What Will It Take?

The two-year Citywide Tree Project involves up-front investment of time to develop a clear understanding of the key issues from a broad array of perspectives. City staff met with community representatives and experts early on to discuss the issues and potential solutions. A stakeholder group

representing a wide range of interests has been formed to further evaluate the issues and the strengths, limitations, costs, and benefits of various solution options.

This input will be instrumental in helping to narrow and shape the solutions. Based on the preferred solutions, staff will

draft recommended code amendments during the fall of 2008. Recommended solution packages and draft language will be presented in the winter of 2009 to the Planning Commission in a broader public forum. Ultimately, City Council will select and adopt the recommended package of solutions.



Trees are an important part of the environmental, economic, and cultural fabric in the city.

Tell Us Your Story, Send Us Your Pictures

Do you have an interesting tree preservation or planting story? Suggestions for ways the City can improve its tree regulations?

Share your stories and ideas with the project team contacts

listed on the front page. Be sure to include an approximate date and general location for your story.

Also, we are constantly trying to improve our project website and would love to include your

photos. If you have pictures of trees or tree-related subjects, and would like to see them posted on the project website, please indicate that you agree to let us use them. Thank you for your interest and support.





City of Portland Bureau of
Planning and Sustainability
 Sam Adams, Mayor | Susan Anderson, Director

Project Charge

The Citywide Tree Policy Review and Regulatory Improvement Project is a multi-bureau effort led by the Bureau of Planning and Sustainability. The project is a high priority in the City's Urban Forest Action Plan. Its charge is to clarify, simplify and provide a consistent and effective regulatory framework for trees in the City of Portland, and to enhance the urban forest canopy through development and redevelopment.



Citywide Tree Project

Policy Review & Regulatory Improvement

Stakeholders have fruitful discussions

A 20 member Stakeholder Discussion Group (SDG) was formed in spring 2008 to foster an open dialogue between various groups with interests closely tied to trees.

The SDG is comprised of members from the Urban Forestry Commission, Johnson Creek Watershed Council, Multnomah County Drainage District, Friends of Trees, NW District Coalition, Columbia Corridor Association, Homebuilders Association, East Side Neighborhoods Group, Citywide Parks Group, Portland Audubon, Institutional Coalition, and a residential infill developer, planning consultant, commercial developer, and certified arborist. Staff from the bureaus of Planning, Environmental Services, Parks and Recreation, Transportation, and Development Services provided staff support and participated in the discussions.

The SDG met from April through October, discussing code complexity and inconsistency, tree preservation during development, and implementation, including inspections, enforcement, and neigh-

borhood notification. The participants reviewed staff's initial analysis of the major issues and potential solutions, candidly sharing their thoughts, opinions, experiences, and advice. The SDG members also gave input regarding tree-related issues that should be addressed through the Portland Plan.

Stakeholders generally agreed that trees are important amenities in the City, and that existing regulations and the regulatory structure could be much clearer, simpler, and more effective in enhancing the urban forest. There is also a growing appreciation for trees as an

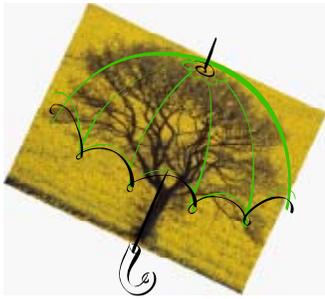
integral component of the City's "green infrastructure." Still, the stakeholders brought many different viewpoints "to the table." Neighborhood groups expressed concerns about the loss of trees, particularly the large trees. They are concerned about impacts on slope stability, shade, and neighborhood identity. SDG members noted that large, native trees are often replaced with smaller ornamental trees that contribute less to air and water quality, stormwater management, habitat, and neighborhood livability.

The development community explained how difficult it can be to meet various City requirements, including tree protection, especially when developing smaller sites. De-

Continued on page 2

Tree preservation and development issues are intermingled in a complex web, much like the branches in a tree.





Trees help manage stormwater.

By the numbers . . .

A tree does not reach its most productive stage of carbon storage for about 10 years.

An acre of trees can absorb as much carbon per year as is produced by a car driven up to 8,700 miles.

Shade trees can make buildings up to 20 degrees cooler in the summer.

The amount of oxygen produced by an acre of trees equals the amount consumed by 18 people each year.



Seeing the forest for the benefits of the trees

Why are urban trees important? During Portland's early days, trees were cleared in order to attract prospective development. But even then, trees were planted to dignify parklands and promote home sales. As the City grew, trees gained recognition for their aesthetic and cultural benefits. Certain trees were designated as historic landmarks in the 1970s. In the early 1990s, the City began to recognize heritage trees based on their age, size, type, historical association or horticultural value.

Today, the City recognizes the suite of benefits or "eco-

system services" that trees provide. During the 1990s the City adopted its first Urban Forestry Management Plan and protections for forested areas through environmental overlay zoning. More recently, the City recognized how trees contribute to watershed health in the Portland Watershed Management Plan. The City partners with Friends of Trees and watershed groups to plant trees in Portland neighborhoods and natural areas. Existing tree protections and planting programs are key elements of City programs to comply with state and federal environmental mandates.

ENHANCING CANOPY THROUGH DEVELOPMENT

Portland expects a million more residents over the next 20 years. To address stakeholder concerns, the project identified the key issues and opportunities to address them. For example, the City currently requires tree preservation plans only in limited development circumstances. Even then, existing rules do not effectively prevent removal of tree groves and large, native trees, or fully prevent damage to trees during construction (including trees on or just across property lines or on neighboring property). The development community notes that the City's rules are rigid, often resulting in

preservation of smaller, lower quality trees. The City's landscaping standards also do not promote tree preservation or planting of "higher functioning" trees.

The Citywide Tree Project is examining incentives to encourage tree preservation and effective planting. Development standards (e.g., setbacks, minimum building coverage, pedestrian access configuration) could be more flexible. The City could also provide advanced mitigation credit for proactive tree planting. The City could establish an initial assessment process to promote "designing with trees."

That said, it must be understood that not all trees can be protected. The Citywide Tree Project is exploring ways to ensure that tree replacement addresses multiple functions, tree size,

As the discussions of climate change intensify, trees earn yet another role; as sequesters of carbon, filters for the air, and elements of passive solar heating and cooling. An ambitious strategy for enhancing the urban forest is recommended in the City's Urban Forest Action Plan and draft Climate Protection Strategy. Additional studies have also linked trees to increased property value, crime reduction, faster patient recovery, and a sense of place.

The City is now committed to a significant tree planting investment through the "Grey to Green" initiative. This investment in our green infrastructure translates into a more livable Portland.



and species diversity. In-lieu tree planting fees should be updated to reflect current costs and ensure that money in the City tree fund is invested most effectively.

Stakeholder discussion, continued from page 1

Developers are concerned about impacts of tree requirements on affordability, project costs, and review and construction timelines.

All told, the stakeholders volunteered over 1,000 hours to help inform and shape the potential solutions under consideration (listed on page 3).

OPTIONS UNDER CONSIDERATION

The project team is detailing a list of key improvements to the current regulatory system. The following options form the basis for the draft code and procedural proposals.

REGULATORY CLARITY AND CONSISTENCY

Establish a single point of contact for the public.

A single point of contact will provide prompt, consistent responses to tree-related questions and requests. Citizens will be directed to the appropriate information or staff representative.

Pilot a 24-hour "Tree Response Hotline."

Citizens and city staff who have after-hours and weekend tree cutting inquiries and street tree emergencies can contact this hotline, which could be piloted using the Bureau of Environmental Services "Spill Response" line.

Consolidate rules into a new citywide "Tree Title."

Consolidating tree related rules into a single City code title would clarify, simplify, and improve the cohesiveness of the regulatory framework, while also elevating the important role of Portland's urban forest.

Consolidate tree permitting functions.

Currently, multiple bureaus are responsible for tree-related permitting. The City Council has called for consolidation of many City permitting functions. Tree permitting functions could be in one central location, simplifying the application process, and ensuring more consistent implementation. City arborists could help support and expedite the permitting process.

Make the tree permit system more consistent, equitable & comprehensive.

Currently, single-family properties are subject to different tree removal permitting requirements. The project is considering options to make the permit system more uniform, while continuing to allow quick removal of hazard trees.

ENHANCE THE URBAN FOREST

Encourage tree preservation – provide flexible development standards.

The project is proposing greater flexibility in site design requirements when trees will be retained without a time-consuming and expensive adjustment process.

Provide advanced mitigation credit for proactive tree planting.

This approach will encourage property owners to plant trees ahead of future development projects to offset tree loss when those projects occur.

Perform "initial tree assessments" to inform project design.

This approach encourages trees to be factored into any major investment or commitment in a site design. The assessment can then be used to evaluate an applicant's proposal against more meaningful preservation and planting criteria.

Improve tree preservation, planting and protection through land use reviews and building permits.

Proposed tree preservation and planting standards would be tiered and applied equitably across development types, recognizing lot size, land uses, and different flexibility and constraints associated with different development types. Ensure that trees on-site, on property lines and on adjacent properties are protected from damage during construction.

Improve tree replacement

Establish tree replacement guidelines that compensate for functions lost when trees are removed. Address quantity, size and species diversity.

Promote retention of significant trees.

Emphasize *preservation* of important tree species and large trees, and *replacement* of smaller, non native trees.

IMPLEMENTATION IMPROVEMENTS

Publish a tree manual.

The Portland Tree Manual will include flexible standards and best management practices for tree protection, planting, and tree care. It will assist project applicants and property owners, will be user-friendly and can be readily updated to reflect new technologies and information.

Update tree fund administration.

The project proposes to update in-lieu of planting fees to reflect current costs and to clarify criteria for expenditures to better address watershed and neighborhood equity issues.

Increase neighborhood awareness of tree preservation and removal activity through consistent site posting.

Instituting a site posting requirement will provide property owners, builders, subcontractors, neighbors, and inspectors with information on tree preservation requirements, penalties for non-compliance, and who to contact with questions.

Provide access to tree permit and preservation plans online.

Using the existing PortlandMaps website, tree cutting permit information could be posted, and in the future, online access to tree plan drawings may also be included.

Enhance inspection effectiveness.

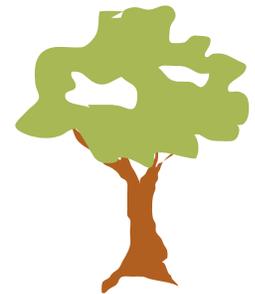
The project will recommend more frequent, better timed inspections to ensure tree preservation and protections are working. Additional training for inspectors and strategic consultation with City arborists is also recommended.

Clarify and simplify enforcement procedures.

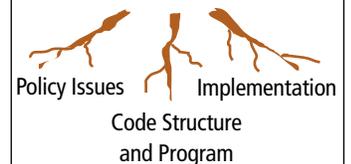
The project proposes a simpler process to better reflect the severity of violations, and expedite replanting.

"I never before knew the full value of trees. My house is entirely embosomed in high plains trees, with good grass below and under them I breakfast, dine, write, read, and receive my company. What would I not give that the trees planted nearest round the house at Monticello were full grown."

Thomas Jefferson



The three legs of the Citywide Tree Project:



THE BIG PICTURE, THE PORTLAND PLAN



The Citywide Tree Project will refine and improve Portland's regulatory framework, confirm and clarify existing city policies, and develop a system that can be readily integrated into the fabric of Portland's future. However, there are important tree-related issues that are outside the scope of the Citywide Tree Project.

Accommodating future growth while providing sufficient space for trees, integrating trees into a carefully planned network of habitat areas and connectors and into a sustainable energy system are just a few of these broad-reaching topics.

Over the next three years, the Bureau of Planning and Sustainability will lead a project to update the City's 1980 Comprehensive Plan. The "Portland Plan" is an inclusive, citywide effort to guide the physical, economic, social, cultural and environmental development of Portland over the next 30 years. Through the Portland Plan, the city can evaluate ways to accommodate growth and shape the city while fostering a thriving urban forest.

“The best time to plant a tree is twenty years ago. The second best time is now.”

African Proverb



FOR MORE INFORMATION

Visit the website:

www.portlandonline.com/planning/treeproject

WANT TO CONTACT US?

Send an email:

BOPCTP@ci.portland.or.us

Write a letter:

Bureau of Planning and Sustainability
c/o Tree Project
1900 SW 4th Ave.
Suite 7100
Portland, OR 97201

Call us:

503.823.7700
503.823.6868 TDD



City of Portland Bureau of Planning and Sustainability
Sam Adams, Mayor | Susan Anderson, Director

WHAT'S SIGNIFICANT ABOUT SIGNIFICANT TREES

Several of the initial project proposals increase the emphasis on preserving “significant trees.” This responds to the community concern over the loss of Portland’s big trees and tree groves. Significant trees are trees that are native to the Portland area, or are larger than a specified size. These trees provide more substantial benefits and services than those provided by smaller, non-native ornamental trees. Significant trees are critical to help reduce stormwater runoff, provide shading and cooling, capture carbon, and provide wildlife habitat. Some significant trees represent species that are rare and

declining in the region. For instance, Oregon White Oak and Pacific Madrone trees provide unique habitats, are very slow growing and require specific soil types and sun exposure to flourish. Other native trees, like the Douglas fir, are ubiquitous, connecting us to our geographic and cultural heritage.

Significant trees are already recognized in the Portland Zoning Code and given priority for preservation during land divisions. Native trees are an important aspect of the Willamette River Greenway and other environmentally sensitive areas.

City’s rules aren’t clear cut

Question: Do I need a permit to remove my tree?

In Portland this question is easier to ask than to answer. The City’s tree related regulations are placed in multiple titles.

Removal of trees on private property is regulated by the Parks Title (Title 20) and the Zoning Code (Title 33) depending on whether the property is in a specific overlay or plan district area, and whether development is occurring or not. Removal of trees from hillsides requires a permit through the Parks Title and the Building Regulations Title (Title 24). Street trees are regulated by the Vehicles and Traffic Title (Title 16), Public Improvements Title (Title 17), and Parks Title. Hazard tree abatement is addressed through the Vehicles and Traffic Title, Parks Title, Property Maintenance Title (Title 29), and Fire Regulations (Title 31). Trees and solar issues are discussed in the Administration Title (Title 3), but there is no discussion of trees

and signs in the Sign Regulations of Title 32.

Not surprisingly, this array of codes leads to confusion when someone asks what rules govern trees on their property or in the parking strip. Determining which requirements apply is difficult, and finding out which City agency is responsible can be equally confounding. To determine the requirements to remove a tree may require contacting up to four separate bureaus.

To add to the confusion, the regulated tree sizes differ from code to code. The City’s tree cutting permit system applies inconsistently to single family property.

The Citywide Tree Project is proposing consolidating the multiple tree-related codes into a single Tree Title and creating a Tree Manual to assist property owners and applicants with tree related issues. Additionally, the project proposes a single point of contact to obtain answers to any particular tree related question.



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Appendix I

Citywide Tree Project Scope

Citywide Tree Policy and Regulatory Review Project

Scoping Paper

Introducing the project

The City Council has directed the Bureau of Planning to lead a multi-bureau effort to review and refine, as needed, Portland's policies and regulations relating to trees. This project is listed as a high priority action item in the *Portland Urban Forest Management Plan* (UFMP) Draft Action Plan, reviewed and accepted by City Council on March 14, 2007. The 3 main goals of the UFMP are:

-

The project also received strong support from citizens, community organizations, and the Bureau of Planning FY 2007-08 budget advisory committee.

Several key project objectives have been identified based on input from stakeholders such as the Southwest Neighborhoods, Inc., representatives of Portland's Citywide Land Use Chairs Group, and city bureau staff:

- Create a comprehensive, consistent and clear policy framework and regulatory program addressing trees on private and public land (including rights-of-way) in Portland
- Improve the effectiveness of mechanisms to track and enforce requirements for tree preservation and replanting
- Provide clear, accessible information to the public about tree maintenance and removal.

The project will include collaborative work with stakeholders to identify and evaluate key issues and potential solutions, and to make changes to City policies, codes and procedures as needed.

For a complete project Statement of Work (submitted to City Council during the budget process) see Attachment 1.

Project scope

The Citywide Tree Policy and Regulatory Review project is to be completed within 2 years. Early actions are to be identified within one year or sooner. To meet the project objectives within the allotted time and budget, the Bureau of Planning will work with other bureaus and community stakeholders to:

1. Establish clear and realistic project success criteria;
2. Craft a well-defined scope of work (identifying what will and will not be addressed by the project); and,
3. Ensure that the project success criteria and scope of work are understood and accepted by key stakeholders.

This scoping paper is intended as a discussion piece to help establish project success criteria and a work scope. The paper contains an initial list of success criteria, followed by a list of issues that have been identified by community members and/or staff, so far, as important to address. The Bureau of Planning will share this draft report with a broader range of bureaus and

community stakeholders and invite feedback on the criteria and priority issues to address during the course of the project.

Project Success Criteria

The project scope should be designed to meet a defined, agreed upon set of "project success criteria." Defining the project success criteria will foster a consistent understanding among diverse stakeholder interests as to what the project is and is not intended to accomplish. The project success criteria must address both "content-" and "process-related" issues.

In terms of content, the project should be designed to address key problems and concerns related to tree removal, preservation and replacement as documented in the *Southwest Tree Committee Report* (October 25, 2005), RICAP database, the tree issues identified in the *Land Division Code Monitoring Report* (May 2007), and the Urban Forest Management Plan Implementation Strategy/Draft Action Plan (November 2006).

The project success criteria should reflect frequently cited issues concerning the City's tree policies and regulations, such as:

- Conflicts among policies contained in different guidance documents
- Complexity, ambiguity, duplication and inconsistencies among City codes and titles
- Inconsistent interpretation and enforcement of conditions of approval regarding tree preservation/replacement
- Inadequate tracking mechanisms and follow-through on conditions of approval (particularly tree preservation plans)
- Lack of clear and accessible information regarding required tree removal or maintenance for property owners
- Impacts on trees as a result of infill development

The project success criteria must also address:

- Broad-based interest among bureaus and community stakeholders
- The fact that policies and codes will be effective only if effectively implemented over the long-term

Taking into consideration the project objectives and issues identified above, the following initial list of project success criteria are proposed for discussion:

- The solution(s) should be understandable to citizens, developers, city staff
- The solution(s) should result in an overall improvement in clarity of information and ease of access to the information
- The solution(s) should result in an overall "improvement" in tree regulation implementation and enforcement, with the understanding that not all identified "problems" will be resolved with this project.
- The solution(s) will, at a minimum, continue Portland's compliance with any state and federal clean water and clean air requirements.
- The solution(s) will keep City cost for implementation and enforcement to a minimum.

Recommended Potential Project Elements

Presented below are a number of specific issues recommended for inclusion in the Citywide Tree Policy and Regulatory Review project scope of work. The intent of identifying issues is to foster discussion and aid stakeholder understanding and anticipation of the project. Issues are grouped under the following sections:

Policy Issues
Code Issues
Implementation Issues

The initial lists are based on stakeholder input received to date and will be amended to reflect additional input during the project scoping process.

A. POLICY ISSUES

1. Inconsistencies/lack of clarity between City plans and policy documents.

There are inconsistencies between the types and levels of tree-related policies and goals established in documents such as the *Comprehensive Plan*, the *Urban Forestry Management Plan*, the *Portland Watershed Management Plan* and the Sustainability Principles. In addition, the roles and functions of trees and tree canopy are not well addressed in the *Comprehensive Plan*. Existing policies lack cohesiveness and unity. The analysis will note all the areas where trees are and are not addressed, e.g., relative to infrastructure, air and water quality, stormwater management, erosion and landslide prevention, and tool to foster pedestrian-friendly streets, public health, etc.

Bureau of Planning Recommendations: The project should clarify the respective roles of these documents and at a minimum develop recommendations for improved clarity and consistency as needed.

2. Cumulative impacts.

Impacts on the urban forest and other natural resources occur over time as a result of small decisions and actions on individual sites, not necessarily large projects. Not all impacts to the urban forest are regulated, such as allowed tree removal on developed residential sites that can not be further subdivided. Impacts can include significant loss of tree canopy in certain areas, and the conversion of large mature, native and non-native trees to small ornamental trees. The City does not currently have policies addressing cumulative impacts.

Bureau of Planning Recommendations: The project should explore this issue and identify potential policies and tools to address the issue, e.g., no net loss of tree canopy/net gain through broad-based mitigation for loss of tree canopy. Loss of /mitigation for forest understory vegetation in environmentally sensitive areas should also be addressed as part of the discussion.

3. Achieving planned density/infill.

City policies to achieve planned densities through infill development and by allowing or requiring certain types of building form appear to compete with the City's Urban Forest Management Plan Goals and Desired Outcomes. City policy does not address how to mesh other city goals while achieving density. This issue has arisen most recently in areas of East Portland, and areas of Southwest Portland have been experiencing incremental loss over time.

Bureau of Planning Recommendations: The project can address some of the impacts of infill development by coming up with tools to manage cumulative impacts, and by addressing some of the regulatory issues covered in the next sections (e.g., preservation and replacement of trees). The project should not address issues relating to the Comprehensive Plan and Base Zone designation in high infill areas. These issues should be addressed through area-specific projects such as the East Portland Review and follow-up actions from this work.

4. **Accountability for meeting and implementing City goals.** The City sets goals and policies to guide regulations pertaining to urban form, tree protection, landscaping treatments, etc. but then defers inspection and enforcement to the same stakeholders who are required to comply with the regulations. When the City does conduct inspections, expertise on specific tree and landscaping requirements is lacking. There are recent case examples where neighbors hired their own arborist to counter the arborist reports submitted with land use reviews. Some city land use review staff lack the expertise to properly judge arborist reports and have asked the urban forestry staff to help with the review, but frequently an “objective” third party (arborist) review is what is needed. City code calls for reliance on arborist recommendations and decisions as to which trees should be removed or protected in both development and non-development situations. Lack of oversight and guidance has resulted in decisions and actions that are inconsistent with each other and with City policy.

Bureau of Planning Recommendations: The project can provide the opportunity to research and recommend other alternatives for inspection and enforcement that better achieve compliance with City goals and policies.

5. **Managing trees and other City infrastructure facilities.** Goal 11 of the Comprehensive Plan describes the goals and objectives for the provision and maintenance of all public facilities. Trees are not currently considered a “public facility” or “infrastructure” in the same way that streets, sewers, etc are considered infrastructure, despite ample evidence documenting the many functions trees provide in an urban environment: stormwater detention, moderating temperature extremes, reducing air pollution, etc. Trees roots can sometimes interfere with other infrastructure elements such as underground utilities and sidewalks. Because existing policy does not address trees as an important infrastructure element, the engineered infrastructure element takes precedence and trees are damaged or removed when roots get in the way.

Bureau of Planning Recommendations: In combination with other policy issues described above, the project can provide background and recommendations to include trees when planning for infrastructure and public facilities, and to modify appropriate policy documents that guide the development and maintenance of public facilities.

B. CODE ISSUES

1. **Complex code structure/issues relating to multiple City Titles**

Current tree regulations and related administrative rules pertaining to inspections and enforcement have been established within several City code titles as summarized below:

- **Title 3 Administration** – describes city organization, functions, and the roles and responsibilities of each city bureau including inspection and enforcement of city regulations pertaining to trees and landscaping.
- **Title 17 Public Improvements** – addresses city infrastructure including streets, sidewalks, sewer and stormwater conveyance systems, and maintenance responsibilities including the removal of tree roots that interfere with infrastructure operation (17.52). The *Stormwater Management Manual* is one guide that helps implement Title 17 stormwater requirements (17.38) and includes tree specifications. Guidance for conflicts between tree root problems and trees planted to meet stormwater requirements seems to be lacking.
- **Title 20 Parks and Recreation** – describes the rules and regulations pertaining to City parks, including infrastructure and trees. Includes the following chapters that address specific aspects of tree cutting, planting, and maintenance:
 - Chapter 20.40, *Street Tree and Other Public Tree Regulations* - creates the *Urban Forestry Commission* and authorizes the City Forester to regulate tree planting, cutting, and maintenance on public property including street trees, and stipulates street tree requirements for new subdivisions and additions to existing structures
 - Chapter 20.42, *Tree Cutting* – regulates tree removal on private property
- **Title 24 Building Regulations**– regulates land development to safeguard the health and safety of citizens; includes regulations for land clearing, grading, earthwork, and erosion control on private property, including tree cutting on slopes. Chapter 24.42 regulates tree cutting everywhere except “in situations where the same activity is already regulated and reviewed by other provisions of the City Code”. Citizens (and city staff!) have found this disclaimer confusing.
 - Chapter 24.70.020.C, *Clearing, Grading, and Erosion Control Permits* – describes the conditions under which a tree cutting permit is or is not required. (NOTE: this chapter doesn’t present any issue per se, but should be included in the overall review of codes for overlap/gap issues and for possible streamlining/simplification recommendations)
- **Title 31, Fire Regulations**, Chapter 31.30.010 allows the Fire Bureau to request *new* street widths with “unobstructed” access for fire apparatus, and (31.30.020) to designate “no parking” areas on existing streets with limited width. But “obstructed” is not defined (obstructed by trees?) and there is no direction for situations where “unobstructed” might conflict with tree preservation requirements or other City title requirements.
- **Title 33 Portland Zoning Code** – implements the City’s Comprehensive plan. A number of chapters address trees as a component of development or land divisions, including limiting tree removal in sensitive natural areas, special plan districts, general landscaping requirement, tree preservation, and scenic corridors; requiring tree planting for buffering purposes and as mitigation; providing violation remediation for illegal removal of trees. Code details are provided in the next section.

The following issues are attributable to provisions located within more than one city title:

Unclear procedures and authority

Due to the City's complex code structure it is difficult for citizens and staff to understand, and to explain, which regulations apply and which bureaus have the authority in different situations relating to trees. Inconsistent interpretation and enforcement regarding tree preservation, replacement, and management confuse the public. People do not know if or when a permit is required to remove a tree and neighbors do not have a consistent point of contact for reporting potential violations. (This issue is also an "implementation" issue)

Inconsistent regulation and measurement of tree size

Most of the city tree regulations measure trees at DBH; the industry standard DBH is 5 feet above the ground but the zoning code defines DBH as 4.5 feet above the ground. Various codes require multiple sizes of trees to be planted (6, 10, 12, 20 inches) with various spacing between trees.

Inconsistent regulation of trees on public and private property

(This item related to "unclear procedures and authority") Title 20 regulates the removal of trees on public and private property with exceptions on private property that don't also apply to public property. Title 33 also regulates tree removal on public and private property, but in different circumstances depending on the base zone and overlay zone, and whether the trees were planted to meet a zoning code requirement or not.

Inconsistent regulation of trees inside and outside environmental zones

Tree preservation and planting requirements have been consistent for the last 12 years on properties with environmental zoning, but other tree regulations of the Zoning Code have changed over time. The result is a confusing mixture of tree regulations that sometimes must be applied all together. For example, a lot in the Johnson Creek Basin Plan District (with specific tree protection/removal regulations on steep slopes or within the floodplain) with partial environmental zoning, is also subject to land division tree protection requirements.

Inconsistencies or gaps in regulation of tree removal

Title 20 and Title 33 apply to tree removal on both public and private property, but the regulations perform an intricate dance that leaves gaps. For example, Title 20 regulates tree removal on all properties unless the tree removal is included as part of a building permit, or if the trees are in an environmental or greenway overlay zone – except on public land, and then Title 20 requires a permit. Title 33 regulates the removal of trees on public or private property within an environmental or greenway overlay zone. Title 33 allows the removal of "nuisance" trees anywhere in the city without a permit, but on public property Title 20 requires a permit for the removal of nuisance trees, even if in a greenway or environmental overlay zone.

Inconsistent use of terminology

Terminology is used inconsistently in the various codes, and some provide specific definitions while others do not.

Bureau of Planning Recommendations: The project should characterize issues that cross multiple titles and assess potential solutions that can be accomplished by: 1) improving coordination, procedures, and information/2) amending specific code provisions; and, 3) by modifying the structure of the City's code titles.

2. TITLE 33 PORTLAND ZONING CODE

Many of the most pressing tree-related concerns relate to the provisions of Title 33 and how they are carried out. Some community stakeholders have expressed strong concerns that the zoning code does not seem to be effective in preserving tree canopy, particularly mature trees. Additional concerns have been expressed regarding the replacement of mature trees such as native conifers with small non-native ornamental trees, resulting in long-term changes in neighborhood character and reduced watershed function (e.g., stormwater management) over time. Other stakeholders have expressed concern that the zoning provisions are too rigid and costly, and impede development in the City's commercial and industrial zones. Given the diverse concerns identified to date, the project should address at least the following Zoning Code related items:

- **T1 standards**

Tree planting or preservation standards (T1) apply to all new single-dwelling building permits in any zone that allows single-dwelling development. The intent of the standards is to "encourage" preservation, and allow replanting or paying into a tree fund when the first two options are infeasible. However, replanting is the option most frequently chosen. Tree root protection standards were adopted with the T1 standard in 1999 but have since been simplified so that roots are no longer being adequately protected. Also, there is some confusion when and if the T1 standard applies in multi-family or commercial zones where there is also a general landscaping requirement.

- **Base zone development standards**

There are no tree preservation or protection requirements in any base zone; other than the T1 standards described above, developers are permitted to remove every tree on a site, despite the fact that almost every base zone requires a certain percentage of landscaping, including trees, when development is approved. In many cases, large trees are removed to prepare a site for development only to be replaced with much smaller species. The landscaping code provides a "credit" if existing trees are saved and used as part of the landscaping requirement, but is rarely used. This has led to situations such as the one in multi-dwelling zones where developers build housing structures first and remove trees as allowed under current regulations with the building permit, then apply for a subdivision later (after trees are already removed) to avoid tree preservation requirements.

- **Overlay zone regulations; NRMPs, Plan Districts**

Multiple zoning code provisions affect tree protection/planting/removal:

- Overlay zones –environmental, greenway, and scenic
- Plan Districts – Cascade Station, Columbia South Shore, Johnson Creek Basin, Northwest Hills, Rocky Butte, South Auditorium
- Natural Resource Management Plans – Forest Park, Smith and Bybee Lakes, Peninsula Drainage District No. 1, East Columbia Neighborhood

Although many of the provisions of the overlay zones and plan districts are meant to work together, the combination of these sections plus other City titles adds to the general confusion about what applies and where. For example, within the Northwest Hills Plan District, the tree canopy requirement for Balch Creek only applies to portions of the site within the environmental zone. The NRMPs can be thought of as long-term environmental management plans for large areas; they purport to describe on-going maintenance activities as well as new projects, both planned/funded and "wish-list", and provide varying

descriptions of these activities. Some of the described activities are deemed “exempt” from the requirements of the Zoning Code, while others are directed into a land use review process. The problem with the NRMPs is that they have remained frozen within the context of their date of development and as the Zoning Code has been updated, the NRMPs have remained frozen in time. NRMP requirements related to trees supercede any Zoning Code provisions, even those that are exempt, and making a change to the NRMP requires a land use review. (NOTE that additional research is necessary to identify the exact provisions within each NRMP that has application to a citywide tree project).

- **Land Division Chapter**

Tree preservation regulations were adopted with the land division rewrite project in 2002. The requirements have proven difficult to implement and include the following issues:

- Significant trees are not being protected under the current regulations, although that was the intent of the regulation when created
- Code loopholes allow trees smaller than 12 inches to be cut before the land division application
- Tree preservation requirements do not provide guidance or allow staff discretion to determine which trees are best preserved based on location or species.
- Arborists provide inaccurate reports and identify healthy trees for removal
- Trees to be preserved are often damaged by construction equipment
- In some situations, developers can build houses first, then remove trees, then apply for the land division and bypass the tree preservation requirement altogether
- Properties with some environmental zoning are subject to two different, somewhat incompatible tree preservation requirements

- **Tree preservation plan violations**

There is a process to deal with violations of tree preservation plans, eg, illegally removing trees designated for protection as part of a land division approval. The process and any associated fines are not enough to deter the continuation of violations, this according to several developers who have been subject to the violation process (eg, it's cheaper to cut than to follow the process).

- **Violations**

Environmental zone tree removal – treats tree violations differently than land division tree violations

Land division tree preservation plan violations- described above

Title 20 tree cutting permit violations – newly created provisions offering an award for anyone providing information about illegal tree removal that is governed by Chapter 20.40 (public land) and 20.42 (private land) adds to the confusion about which regulations apply to trees. In this case, if an illegally removed tree is (or was) subject to any zoning code provision, the reward program does not apply.

Title 24 clearing and grading violations

- **Portland Plant List/Invasive Plants**

There are some tree species listed as “nuisance” plants that are prohibited from being used to meet zoning code tree planting requirements, but the Urban Forestry recommended list of street trees includes these species.

Bureau of Planning Recommendations: The project can address the issues above as many of them are interrelated and also tie into other code issues as well as policy issues.

2. TITLE 20 Parks and Recreation

As described above, the chapters of Title 20 that cover trees are inconsistent and incompatible with other City Code provisions that regulate the same thing. (note: we will need help from someone well versed with the requirements of Title 20 to continue expanding on this issue and determine the link to other regulations)

- Chapter 20.40 – regulates planting trees and removing trees on public property and in the right of way
- Chapter 20.42 – regulates tree removal on private property when the tree is not regulated by other provisions of the City Code and is also on a single-family developed lot and the lot can not be further divided.

3. TITLE 24 Building Regulations

Title 24 implements the uniform building code regulations developed by the State of Oregon. In general, the building code is developed to ensure structural safety and includes regulations that achieve a basic level of protection for life-threatening situations (earthquakes, floods, fire, landslides). The state develops the basic building code elements, and local jurisdictions can add provisions that are specific to their community for issues that may be more prevalent than in other parts of the state. For example, the City Council enacted a ban on clearing and grading on steep slopes without a permit in the 1990s when such clear-cutting was creating a landslide hazard to adjoining properties. (note: we will need help from someone well versed with the requirements of Title 24 to continue expanding on this issue and determine the link to other regulations)

- Demolition permits – can be used to effectively clear trees and grade sites
- Clearing and Grading permits –
- Other?

4. TITLE 31 Fire Regulations

Title 31 implements fire regulations for the City

C. IMPLEMENTATION ISSUES

There are many City Code provisions to implement and enforce, with various bureaus having more responsibility to inspect and enforce their own bureau’s regulations and sometimes the regulations of other bureaus. Inspection staff frequently have specializations in structural areas unrelated to plants, but must provide the inspection to ensure compliance with a permit. The following topics are a first attempt at characterizing implementation issues and will be further developed in discussions with stakeholders.

1. During/after construction

- Inspections performed by non-experts – despite best intentions, the City’s inspectors for most tree-requirements are not knowledgeable about trees or plants. In addition,

some of the urban forestry requirements allow inspections by non-experts instead of the experts in the urban forestry department.

- Trees to be preserved are inadequately protected and are damaged by construction equipment - the existing tree protection requirements, when followed, are inadequate for protecting trees. When there is a failure to provide even the basic tree protection elements, inspectors fail to note this lack.
- Required plantings often not monitored after initial inspection. Once a building permit is issued and the building occupied, there is very little follow-up with the developer or property owner. The requirements are only completed as a complaint-driven enforcement action, when a neighbor calls the City to complain.
-

2. Enforcement

- Reporting/point of contact – there is no one contact for tree-related concerns. Urban Forestry has developed a brochure to help direct inquiries but it provides a confusing message, at best, as to the appropriate bureau to call.
- Current violation fees makes it cheaper to cut trees first, then go through violation process. Staff have received feedback from developers that it is easier to cut now, pay later, than to follow requirements or request changes to tree protection plans.
- Enforcement is complaint driven and penalties and mitigation may not be effective in deterring cutting or replacing lost trees.
-

3. Changes in ownership/occupancy

- New owners/renters unaware of tree preservation agreement (this issue applies to zoning code landscaping requirements as well). Some tree removal violations could be prevented if they were aware of the requirements.
- Single-dwelling residential development is where most of the tree issues occur, yet there is no “final occupancy” permits that can be held back to delay structure occupancy until tree requirements are met.

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Appendix J

Citywide Tree Project Issue Papers

- 1. Trees, Utilities, and Infrastructure**
- 2. Coordinating Plan Review – Public/Private Infrastructure and Tree Preservation Requirements**
- 3. Tree Preservation:**
 - Land Divisions**
 - New Single Family Residential Development**
 - Protection Fencing Requirements**
 - Loss of Significant Trees**
- 4. Development Processes That Lack Tree Preservation Regulations**
- 5. Tree Removal Regulation in City Titles**
- 6. Tree Inspections**
- 7. Violations, Enforcement, and Penalties**

Citywide Tree Project

Policy Review and Regulatory Improvement

DISCUSSION DRAFT

Issue Paper

Trees, Utilities, and Infrastructure

ISSUE SUMMARY

The placement, installation, and maintenance of new or upgraded utility and infrastructure facilities often occurs without sufficient regard to the location of existing trees. These activities can potentially damage and destroy trees. In addition, trees are sometimes planted too close to existing utility and infrastructure facilities which can result in root or branch encroachment. Such damage could require removal of the tree and/or utility in the future.

BACKGROUND

New development requires installation of utilities and infrastructure facilities. Besides traditional elements such as electric and telephone lines, water and sewer pipes, sidewalks and pavement, room must be found for newer elements such as bike lanes, stormwater swales and cable. Due to the limited space available, it may not be feasible to preserve trees. In addition, utilities can be installed too close to trees that are supposed to be preserved.

Repairing or retrofitting infrastructure and utilities in existing neighborhoods can harm trees. Installation or expansion of utilities and rights-of-ways for infill development also has the potential to affect trees. Road or sidewalk widening, stormwater swale construction, replacement of water mains and clogged sewers can damage tree roots or lead to tree removal.

As trees grow, they can pose a risk to adjacent utilities and a cost to the city and private property owners. At the same time, larger trees become more valuable as they provide greater stormwater and other environmental functions. Tree root growth and the ultimate maximum tree height are not always considered before new trees are installed in the right-of-way or on private property. Branches can entangle overhead power lines and roots can enter and/or break sewer pipes. Growing roots can buckle sidewalks and roadways. The ongoing clean-up of leaves, fruit and nuts become responsibilities for the Bureau of Maintenance and the adjacent property owners. The aesthetic values and environmental services that trees provide increase dramatically with size, as do potential conflicts with existing or planned infrastructure and utilities.

Finally, a lack of coordination during development review can exacerbate the conflicts between trees and utility and infrastructure installation, maintenance and improvement. This lack of coordination is examined in the Issue Paper entitled *Coordinating Plan Review of Public/Private Infrastructure*.

DISCUSSION

The next section of this paper explores a number of situations where conflicts between trees, utilities, and infrastructure facilities can occur.

Trees and Existing Infrastructure Improvements

Improvements to existing right-of-ways can result in removal of trees or construction-related damage if utility and street work are not coordinated properly. A number of bureaus work in the right-of-way and each issues its own permit. Therefore several different contractors may be working around a tree at the same time, but each is subject to different requirements. Utility work on private property does not typically address tree protection.

One common scenario is the need for incremental improvements in established neighborhoods with substandard streets. New development and land divisions are the primary opportunity for

the city to obtain frontage improvements. These frontage improvements can include sidewalks, curbs, stormwater systems and planting strips. Upgrading streets to meet current standards for frontage improvements often takes precedence over retaining trees. In some instances, however, the Portland Office of Transportation (PDOT) has allowed alternative materials or construction techniques to avoid damage to significant trees.



Figure 1: Aerial view of SE Schiller – an unimproved roadway with extensive tree canopy giving way to an improved right-of-way without trees.

As infill development continues, it becomes more challenging to meet utility and infrastructure requirements while simultaneously protecting existing trees. This is, in part, due to the limited space available for the new infrastructure. Figures 1 and 2 show an example on SE Schiller where new development has resulted in a widened roadway, with sidewalks, planter strip and driveways. The continuation of these improvements onto adjacent properties will require substantial additional tree removal. It is worth noting that even though the land division review process does not address off-site trees, PDOT's permitting process does require that trees within 15 feet of the right of way to be identified on the plans, but not necessarily preserved.



Figure 2: SE Schiller looking east towards the unimproved section with a number of trees adjacent to the roadway that will likely be removed as the properties are developed due to street frontage improvements and the installation of utilities.

Street Trees and Sidewalks

Street trees planted in the public right-of-way are regulated by the Urban Forester in coordination with PDOT. Maintenance costs, however, are borne by the adjacent property owner who must obtain permits to plant, trim or remove a street tree. Where street improvements and maintenance projects require the removal of tree branches to allow access for road construction equipment, the adjacent land owner is responsible for the costs of the actual pruning work.

If a public sidewalk is affected by roots from a tree, then a PDOT sidewalk inspector will require the homeowner to repair the sidewalk. Unless the Portland Parks - Urban Forester requires additional measures to protect street trees, roots may be cut and the new sidewalk repaired without tree preservation in mind. If the Urban Forester limits root cutting, the sidewalk will need to be formed around it. In some cases, changes in sidewalk or driveway design (such as width, location, or alternate use of materials) may occur if the Urban Forester does not allow the tree roots to be cut. The roots from trees on private property that cause buckling or other damage to public right-of-way features may be cut and removed without consulting the Urban Forester.¹



Trees and Overhead Utilities

Large trees near power lines can cause problems as falling limbs are the primary cause of power outages. PGE operates its own extensive tree-maintenance program² that contracts with tree crews to prune trees along power line rights-of-way every three years or as required by state mandate. PGE's crews examine trees on a block-by-block basis and look for trees or limbs that could fail and hit a power line³. Their crews will work on any tree that poses a possible threat to power lines. Usually, these are trees that are planted directly below the lines in a public planting strip, but can also include private trees that overhang the right-of-way. PGE's practice is not to top a tree; instead PGE prunes out a U-section in the middle of the tree to provide clearance for lines. This practice is a type of selective crown reduction. This represents an emerging trend in powerline clearing maintenance from years past, when harmful effects of topping trees was not yet known.

Trees and Sewer & Water Systems

The Water Bureau and Bureau of Environmental Services (BES) each has a number of facilities that can be affected by tree roots. The majority of these are sewers and mains located in public rights-of-way. Tree roots can enter sewage lines and crack or break the pipes causing water to flow into the pipe, decreasing its capacity. Sewage can flow out of damaged pipes into the soil which can create health problems. Additionally, tree roots can block sewer lines causing a backup. Most tree root problems in sewer mains



¹ There is a gap between Forestry and Development Services on the status of trees that straddle a property line between a parcel and the street. Development Services considers a tree in the right-of-way if any part of the trunk is on the property line, while Forestry looks at the likely placement at time of planting. The result is that trees that have grown into the Right-of-Way are not subject to review by Development Services, and Forestry continues to consider them as private trees.

² Title 20.40.080.E authorizes the Forester to contract with utilities to prune trees that interfere with any component of the utility system. Notification of the owner can be waived at the discretion of the Forester.

³ PGE's website provide information to the public on tree pruning, utility safety and their own tree maintenance operations. They also provide a list of trees suitable to different planter strip placements.

are discovered during routine video taping of sewer lines. But problems can occur quickly and are not limited to old pipes. Sewers constructed in the mid to late 1990's are beginning to experience root intrusion. The city addresses roots in city sewer mains and the public portion of service laterals. Private property owners are responsible for lateral sewer pipes on private property. In Portland, approximately 8,000 sewer mains or 2 million linear feet of public sewer lines have some degree of root damage⁴. Damage from tree roots also affects water pressure in public mains and can affect fire service. In these situations, the trees are generally removed. However, in some cases the roots that are causing the problem could potentially be removed without removing the tree. When permits are obtained to install or repair sewer and water pipes on private or public property, there is no requirement for a site plan that identifies adjacent trees.

A number of historic water conduits, such as pipes from Bull Run, cross private lands which have easements to restrict development or tree planting that might interfere with pipes and their maintenance. Similarly, sewer laterals that connect buildings to sewer mains in streets are often placed in easements that serve a similar purpose. Enforcing these easements is problematic because pipes and their easements are often not shown on maps in the Development Services Center and most owners are not aware of the location of utility lines on their property. Since no permit is required to plant a tree, there often is no process to check whether trees are placed above utilities.

Trees and Stormwater Facilities

The City of Portland's approach to stormwater management emphasizes the use of vegetated surface facilities to treat and infiltrate stormwater on the property where the stormwater runoff is created⁵. Managing stormwater onsite is required of all new and redevelopment as specified in the Stormwater Management Manual developed by the Bureau of Environmental Services (BES)⁶. These stormwater facilities are intended to reduce demand on combined sanitary-storm and separated storm sewer systems, promote on-site infiltration of stormwater and reduce polluted runoff as development occurs. Because the right-of-way may need to be expanded to accommodate stormwater facilities, trees are sometimes removed.

Site planning on private property does not always take into account conditions in the right-of-way or adjacent properties. Trees on adjacent parcels or on the property line are not included in site plans or subject to tree preservation requirements of that development. Stormwater facilities on private property may be placed without regard to trees on adjacent property.

For example, a large swale for a private street might be dug into the roots of neighboring tree that is not part of the development. Designed to detain and store stormwater, the swale will be inundated with each rain and may subject an adjacent tree's roots to long periods of heavy soil saturation that may not be appropriate for the species and may contribute to tree windfall. Conversely, swale and stormwater planter landscaping designed without considering proximity to neighboring trees may be adversely affected by shading, leaf litter, etc.

As stormwater facilities are installed on both public and private streets, they require monitoring and maintenance to perform effectively. For public streets, the contractor provides a two year

⁴ Each year, approximately 250,000 linear feet of high and medium priority sewer lines are treated by the City at a cost of approximately \$230,000.

⁵ The Bureau of Environmental Services has also established an administrative rule to protect surface features that convey water across private property outside of existing Environmental Overlay Zones. A thirty foot 'no disturbance' buffer called a 'drainage reserve' is placed across drainage ways through the development review process. The rules offer some protection for existing trees in this 'reserve' area, although tree preservation is not the primary intent of the administrative rule.

⁶ Infiltrating stormwater onsite with landscaped facilities meets a number of stormwater requirements, including pollution reduction, volume and peak flow reduction, and groundwater recharge. Landscaped facilities also improve air quality, reduce heat island affect, add visual appeal to neighborhoods that can increase property values, as well as provide valuable urban wildlife habitat.

“establishment period” during which they are required to monitor and maintain the facilities they construct. After the establishment period, BES monitors and maintains the facilities. Trees planted in a facility are monitored to ensure they are thriving. Private stormwater facilities are supposed to be managed by adjacent land owners via maintenance agreements that run with the land, however, it is not clear how this is being enforced. The increasing number of stormwater facilities has made it difficult to tell if stormwater facilities for either private or public streets are being monitored as frequently as originally intended.

Trees and New Subdivisions

Mature trees can be adversely affected by road building, sidewalks, driveways, public and private utility installation and stormwater facilities in new subdivisions. The City processes only a few new large subdivision applications (10+ lots) each year; the majority of land division applications are for 2-10 new lots. It can be challenging for developers to meet requirements for utilities, infrastructure, and tree preservation on the smaller sites. Due to the site constraints associated with smaller partitions, the tree mitigation option is frequently requested because standard tree preservation requirements typically reduce the area available for development and routing of roads and utilities.

In addition, the site design process and land division review primarily focus on the area within the development site alone. As a result, proposed infrastructure improvements are generally located without regard to possible effects to trees on neighboring properties. For example, on narrow long parcels, a private street, including a required sidewalk and stormwater swale, is often placed at the edge of the site. Although this construction can harm trees on adjacent parcels or on the property line, these trees are not subject to tree preservation requirements and are not typically shown on site plans. The construction damage to trees that straddle property lines is a frequent cause of disputes between neighbors.

During the final step in residential development, new plantings (including trees), are installed to vegetate stormwater facilities and to meet City landscaping requirements. There is not sufficient review or inspection by City staff with expertise in landscaping or arboriculture to verify those trees and other plantings are placed properly. Problems can also result when soils, sunlight availability, and other conditions are not suited to the selected species of tree. Trees placed above, below or next to vulnerable utilities and infrastructure can result in future conflicts.

POTENTIAL SOLUTION CONCEPTS

The following criteria are intended to guide the design and evaluation of potential solution concepts.

Criteria for Solutions:

- Encourage preservation of existing trees in development and redevelopment
- Optimize placement and minimize conflicts between trees, utilities and infrastructure facilities.
- Increase the area and health of the urban canopy
- Foster proper maintenance of trees and utilities
- Foster proper installation of trees and utilities

The following is an initial list of potential solutions to address the issues described above. The intent of this section is to examine a range of possible solutions to help inform discussion and the development of staff recommendations and future decisions.



1. RECOGNIZE AND MANAGE TREES AS INFRASTRUCTURE

The City could adopt clear policies and regulations establishing the role of trees as infrastructure to be planned and managed on a “level playing field” with other infrastructure and utility facilities. The City could also consider capitalizing the installation of street trees and/or establish programs to maintain street trees as public assets. This is listed as an item to be considered in the Urban Forestry Action Plan.

Pros:

- This would explicitly recognize the social and ecological functions of trees within the equation of utility and infrastructure design and replacement.
- This would shift the decision making process around designing utilities to consider trees
- This could potentially reduce the responsibility of private property owners to maintain street trees, fix sidewalks, etc. and could increase public interest in having more trees in their neighborhoods.
- This would provide a more equitable solution for tree trimming work required for other public infrastructure needs.
- This could potentially provide greater public oversight of street tree management.
- In conjunction with other potential solution concepts identified, could help achieve Urban Forestry canopy targets.

Cons:

- Would require significant funding and staffing.
- Will need to evaluate liability issues

2. REQUIRE INFRASTRUCTURE PERMITS TO ADDRESS TREES

Require site plans that show the location of trees within a certain distance of the proposed work for all utility permits. Establish provisions to prevent conflicts between proposed utilities and infrastructure facilities, and trees/tree roots.

Pros:

- This would ensure that trees are identified on plans and are considered as part of a utility or infrastructure permit.
- In conjunction with other potential solution concepts identified, could help achieve Urban Forestry canopy targets and other desired outcomes.

Cons:

- Addressing trees during utility permitting could add time, cost, or possibly hamper the utility work.
- Utility work permits on private land are issued over-the-counter. A site plan (with or without trees) is not required, nor is there a review by Planning & Zoning that apply conditions of approval or a Tree Protection Plan.
- Inspections are a current problem – who would be responsible?

3. INCLUDE OFF-SITE TREES ON PLANS

Require site plans submitted for all infrastructure designs to also include off-site trees up to a certain distance. Establish provisions to prevent conflicts between proposed utilities and infrastructure facilities, and neighboring trees.

Pros:

- This would require consideration of the effects of placing utilities and stormwater facilities in close proximity to neighboring trees.
- This would help address cumulative impacts by addressing trees on adjacent sites.

- In conjunction with other potential solution concepts, could help achieve Urban Forestry canopy targets.
- Would reduce ambiguity in the current regulations pertaining to trees on or near property lines.
- Recognize trees as an organic feature that is not limited by parcel boundaries and that construction impacts can affect trees on other properties.

Cons:

- Access to adjacent parcels to survey tree locations and assess health is not always available.

4. ENHANCE REVIEWS OF LANDSCAPE PLANS

Assign an internal landscape architect or arborist to review landscape and stormwater facility landscaping plans and conduct field inspections to capture 3-dimensional features and development elements (retaining walls, grade changes, slopes, footings, etc.).

Pros:

- This would focus additional expertise on putting the right tree in the right place
- In conjunction with other potential solution concepts identified, could help achieve Urban Forestry canopy targets
- This would verify that trees and plants are installed properly – providing the greatest chance of survival.

Cons:

- Could potentially increase the timeline of review
- Additional costs for a new position
- Quantity of work may not be manageable

5. EDUCATE PROPERTY OWNERS AND DEVELOPMENT COMMUNITY

Educate property owners and the development community regarding proper species and planting locations, tree maintenance and removal procedures. An education program that addresses landscaping design and utilities for property owners, builders, contractors and landscapers might help reduce conflicts associated with new developments and activities in existing neighborhoods. Nurseries, utility companies, and neighborhood tree liaisons could participate in the development and distribution of information and trainings. Community groups could also monitor tree infrastructure, either through a data gathering program or an adopt-a-tree program.

Pros:

- The dissemination of information about trees, infrastructure and utilities would help prevent conflicts and promote successful mitigation of existing problems.
- In conjunction with other potential solution concepts, could help achieve Urban Forestry canopy targets

Cons:

- Making information available does not guarantee that it is used.
- Additional public cost to fund and implement this program
- Success is dependent on the quality of information and would need sufficient oversight.

6. PROVIDE UTILITY INFORMATION ON TREE PLANTING PERMITS

When obtaining a permit to plant a street tree, include information about the height of power lines and the location of water and sewer lines on the property, and direct the property owner to avoid planting in those areas. Also include a list of acceptable trees based on planter strip width, presence of overhead lines, etc.

Pros:

- Coordinating street tree placement with existing utilities would help to reduce future conflicts.
- In conjunction with other potential solution concepts identified, could help achieve Urban Forestry canopy targets

Cons:

- The location of laterals is uncertain on many properties in the City.

7. CALL BEFORE YOU PLANT

Publicize the Call 811 program (<http://www.digsafelyoregon.com/>) for utility locates before planting trees especially in the public rights of way. PortlandMaps does provide some information on utility location, but is not always accurate or precise.

Pros:

- Coordinating new tree planting with existing utilities would help to reduce future conflicts.
- In conjunction with other potential solution concepts identified, could help achieve Urban Forestry canopy targets

Cons:

- Most tree planting on private property does not currently require a permit which might reduce participation in such a program.
- Accuracy of known locations may not be sufficient to make informed tree location choices.

8. PREVENTIVE MAINTENANCE FOR SEWER AND WATER PIPES

For new construction or when a sewer or water pipe is exposed, require the joints between the lateral and the main to be sealed or wrapped in a material that protects against root intrusion.

Pros:

- The up-front investment can reduce maintenance costs in the future.

Cons:

- Recapturing costs – who pays?
- Would need to check for conflicts with the plumbing code.
- Uncertain if the long term performance of these methods has been tested.

9. ENHANCE STORMWATER FACILITY MAINTENANCE AND COMPLIANCE PROGRAM

Create a BES inspection and compliance program for stormwater facilities in order to ensure private stormwater facilities are effectively maintained, and to improve routine inspections of increasing number of public and private stormwater facilities in the city

Pros:

- The long-term performance of these facilities is dependent on oversight and education of both the public and City bureaus.

Cons:

- Cost for additional staff and associated inspection/enforcement resources.

10. COORDINATE RIGHT-OF-WAY PERMITTING

Designate a single permitting body to coordinate work within or adjacent to public rights-of-way.

Pros:

- This would allow work plans to be checked against best practices for tree preservation and avoid successive utility work in the same location.
- Would prevent conflicts and inadvertent violations in the field.
- In conjunction with other potential solution concepts identified, could help achieve Urban Forestry canopy targets

Cons:

- Agencies that currently issue their own permit would have to take additional time to coordinate with other bureaus before conducting their work.
- Specialized knowledge within each bureau makes consolidating functions difficult.

Questions:

1. Do other utility companies have authority similar to that of PGE?
2. How does Urban Forestry respond to permit applications to remove private trees (subject to Title 20) if it is argued that they are buckling a sidewalk or infiltrating sewer lines?
3. What clearance around tree branches is necessary to protect power lines?
4. Does Forestry currently consider utility placement in recommendations for street trees?

Citywide Tree Project

Policy Review and Regulatory Improvement

Issue Paper

DISCUSSION DRAFT

Coordinating Plan Review – Public/Private Infrastructure and Tree Preservation Requirements

ISSUE DESCRIPTION

Trees that are planned to be preserved in conjunction with new development are at risk from lack of coordination during permit review and construction-related issues.

BACKGROUND

The City applies a number of specific requirements for utility and other infrastructure improvements at the time new development is proposed. Depending on the scale of the development, requirements may be limited for private and public utility connections for simple “trade” permits (i.e. electrical, plumbing, mechanical trades), or may involve more complex requirements for sewer and water connections, stormwater disposal, street tree preservation or planting, and some level of tree preservation or planting on the site. For large scale developments, public street and sidewalk widening or improvements may also be required.

For very simple utility connections (a new sewer lateral for an existing house as an example), the permit application does not include a site plan. The application includes no information to determine if trees or tree roots will be affected. Further, these trade permits are typically not reviewed by planners to determine whether any tree preservation requirements apply to the site.

Where a land division review precedes new development, the City requires that proposed infrastructure improvements are reviewed so that utilities are planned, coordinated, and designed for the entire subdivision rather than on a lot-by-lot basis. During preliminary plat review, the location of streets, sidewalks, sewers, water mains, storm drain lines and drainage swales are all considered together with the preservation of selected trees on the site. In some cases, to accommodate the installation of needed infrastructure, significant grading may be required, including the construction of retaining walls and carefully tapered slopes that meet specific standards.

Following preliminary approval of the land division, the applicant submits a final plat for review. The final plat is prepared in substantial conformance with the approved land division. The preliminary approval may require specific easements and changes to rights of way dedications to be shown on the final plat. If a roadway is to be widened, or a utility easement relocated, impacts to the tree preservation plan are considered. Minor changes may not be deemed to affect trees, however in some instances the location of utility easements is not considered in light of the tree preservation plans. When a major change occurs, a review of amendments to the preliminary approval is required and an adjustment must be filed with the final plat if the tree preservation standards can no longer be met. These reviews can add several months of additional time to the process. Frequently in these cases, the applicant submits revised arborist reports that further reduce the root protection area, or acknowledge that the infrastructure construction will not be detrimental to the tree.

Whether required as part of public and private street improvements or other site improvements, site construction plans are prepared and submitted during the final plat process. The plans detail how the required infrastructure will be built and provide enough information so that the City’s Infrastructure Bureaus can prepare bonds to assure their construction. The infrastructure

plans are reviewed in two parallel tracks:

- Public infrastructure, such as streets, sidewalks, water lines, public sewer lines, and public stormwater facilities are reviewed by the public works groups in the Portland Office of Transportation (PDOT), the Water Bureau, and the Bureau of Environmental Services (BES).
- Private infrastructure and on-site prep work such as site grading and retaining walls, erosion control, tree protection measures (fencing), private streets, private sewers, and on site stormwater facilities are reviewed by the private construction group of BES, as well as the Site Development and Planning and Zoning Review sections of the Bureau of Development services (BDS).

Under the current system, tree protection oversight is split between three disciplines: the Land Division Planner for the preliminary and final plat reviews (which can sometimes be conducted by two different planners), Planning and Zoning staff for Site Development Permit reviews, and the Urban Forester for public works permit reviews. This is problematic since each reviewer will have their own understanding of how the protection plan is supposed to work, none of the reviewers has a comprehensive overview over the whole process and site, responsibility for public and private trees is split between reviewers, and scrutiny of the tree protection is diluted by the large amount of other considerations on the site.

Coordinating the reviews to ensure the tree protection measures are consistent and sufficient proves to be a challenge. The Public Works permit and Site Development permit drawings are contained in two separate independent sets of plans, and are sometimes prepared by different consulting firms, depending on the size and complexity of the job.

Within each of the plan sets, site details will vary depending on the specific type of improvements under review. For private infrastructure (Site Development permits), the tree preservation information is typically shown on the site grading plan only. However, there is no consistent requirement that trees on private property designated for preservation be shown on the public works permit plans. Typically, tree protection for trees on private property is not shown unless the Urban Forester reviewing the public works permit deems it necessary.

For both public and private development permit applications, it is rare to receive a composite drawing that shows all the improvements, public and private, and tree preservation information on one sheet. Moreover, since the public and private permits are reviewed separately and by different groups of reviewers, both plans can be approved with elements that are in direct conflict with each other¹. Nowhere in any of these plans are private utilities, such as phone, gas, cable, and electric identified (apart from their blanket public utility easement location). The private utility companies are typically not aware of the tree protection requirements, and may trench through a root zone, adding further stress to trees that was not contemplated.

If conflicts do arise and are discovered, there is no formal system of collaboration and no established priorities to resolve those conflicts. For example, one reviewer may require revisions to a sewer line or manhole location due to engineering requirements or constraints. The change may be reflected on the sewer page for instance, but not shown on the grading plan, although the change may have placed the excavation for the manhole within a root protection zone (RPZ). Since only one reviewer is responsible for that change, this encroachment into the RPZ would be missed since the other reviewers typically will not see the

¹ Spencer Meadows, LU 03-177491 and Site Development # 04-038395 SD- This site had a tree required to be preserved in the public stormwater facility and then a public works permit showed it being removed.

plans again after they have approved their part.² If such a change is found to impact another reviewer's approval, then additional time is spent routing the plans around and conflicting details in the plans are worked out through an ad-hoc conversation between reviewers, whose ultimate solution may impact yet another reviewer.

Review of a Site Development permit is prone to the same types of oversights as can occur with Public Works permit reviews. For example, the grading plan may require that a retaining wall be constructed within the root protection area, but unless the retaining wall is called out on the tree preservation plan, it is likely to be missed by the planner reviewing the preservation plan. Also, during site preparation, issues often arise in the field that were not anticipated on the plans, such as adjusting the location of an on site stormwater facility to account for unforeseen grading issues. The resulting field adjustments can adversely affect trees on site. These "on the fly" changes also cause concern and consternation for the public since they were not part of the public review process.

Finally, when the lots have been platted and prepared and the basic utility infrastructure has been installed, the trees to be preserved undergo one final test through the development phase: the building permit. During the building permit review, sometimes the applicant will omit the trees that are required to be preserved from the site plan. Often, trees to be preserved are shown in the wrong location (either due to inaccurate site plan preparation, or inaccurate information in the original land use application). The root protection zone may not be shown or may be shown inaccurately. Frequently, the root protection zones are set to the edge of buildings or driveways and don't account for the practicalities of construction and the excavation required to set foundation or flatwork forms. Utility conflicts with trees can also arise when the final connections to the house need to pass through a root protection zone. Also, if the initial building permit submittal does not show all the required utilities and/or the required root protection zones accurately, independent reviewers may redline these corrections on their copy of the plans, which can cause conflicts that may not be reconciled before the permit is issued. Where conflicts between the building or utilities and the tree preservation arise, the conflict is typically remedied by requiring the applicant to submit an arborist report explaining that the arborist has approved the specified methods of construction, and that the activities will be performed under his supervision. (This will be addressed in greater detail in the Tree Preservation topic papers)

SUMMARY

The infrastructure improvements proposed in conjunction with land divisions are reviewed in several stages, beginning with the preliminary land use approval, and followed by the final plat which establishes the location of utility easements and rights of way. Specific site and public works plans are submitted and reviewed concurrently with the final plat review. The final stage is the building permit review. Each stage of the reviews is performed by several different review agencies and personnel. At numerous points in that process a single inadvertent oversight, error or omission will lead to conflicts between trees to be protected and development. Construction issues that were not initially contemplated during the plan preparation or review can also harm trees that were required to be preserved. In those cases, the results are lost time, and lost trees.

² Cambridge Creek Subdivision, LU 02-127947 PU EN AD, 00-00486 PU SU EN, and Site Development Permit # 20 01-144781 SD- there were other reviews that had to happen due to trees needing to be removed due to public sanitary/storm easements.

POTENTIAL SOLUTION CONCEPTS

The following criteria are intended to guide the design and evaluation of potential solution concepts.

Criteria for Solutions:

- Tree preservation planning and protections are efficient and effective.
- Tree preservation and utility/infrastructure planning should be optimized through early and creative site design.
- Site design and tree preservation plans should take into account the real impacts associated with construction and excavation.
- The plan and permit review process should be designed and coordinated to minimize unforeseen conflicts between utilities, infrastructure and trees at all stages of the process
- The solution should provide certainty to applicants and the public.
- The solution should improve coordination between infrastructure construction and tree protection.
- The solution should result in greater overall efficiency in timely reviews and downstream cost reduction.

The following is an initial list of potential solutions to address the issues described above. The intent of this section is to examine a range of possible solutions to help inform discussion with stakeholders and the development of staff recommendations and future decisions.

1. COLLABORATION MEETINGS

Hold collaboration meetings between public and private works permit reviewers to discuss major or complicated projects. The meetings would be set at regular intervals and the purpose would be to include all relevant reviewers in the discussion to resolve conflicts or raise concerns related to proposed methods of construction. The meeting room would include the necessary tools, codes, admin procedures and computer access for the reviewers to get their answers and approve the plans on the spot. Meetings could also serve as cross training opportunities if there were gaps in the meeting agenda.

Pros:

- Could be initiated currently with existing resources and minimal added cost.
- Provides a forum for the reviewers to share their interests and to discuss and resolve issues and utility conflicts. This also helps to prevent changes required by one reviewer that inadvertently impact another reviewer's requirements.
- Reduces time invested in running permits and corrections back and forth between reviewers.
- Reduces the potential for applicants to get conflicting direction from various city staff. Increases certainty for applicant.

Cons:

- Attendance on similar sorts of meetings has not been consistent. Without a means to compel a particular reviewer or group of reviewers to attend, the meetings are likely to be discontinued.
- If there are few issues to discuss, the meetings could be an inefficient use of staff time. Would need to be cognizant of developing a productive agenda.

2. ASSIGN A TREE SPECIALIST TO REVIEW PRELIMINARY AND FINAL PLATS

A staff person, familiar with the building and construction process, city requirements, and

tree health and mechanics should be involved in the preliminary land division and final plat review to ensure that proposed and required infrastructure improvements and easement locations will specifically not conflict with trees to be preserved. This reviewer could also be utilized in initial site assessment of preferred trees for preservation, and as a result would have on the ground familiarity with the specifics of the trees and other site constraints. This would enable quicker responses to situations that arise.

Pros:

- Assigning an internal reviewer who is familiar with city standards and requirements for infrastructure construction, private utility company practices, and tree issues early in the process will prevent unforeseen and inadvertent conflicts between tree preservation, and the location of utilities and other infrastructure facilities.
- If issues arise later, there is a single review authority who can respond to the problem, reducing delays in determining which reviewer will need to respond. Provides more certainty to both the public and applicant of how the issue will be resolved.
- Creates a single accountable person whose responsibility it is to look out for the tree preservation on site. This function is currently split between the land use planner for on site trees and the urban forester for street trees.

Cons:

- Assigning an additional reviewer requires staffing adding up front expense to the process.
- Does not, in itself, fully resolve conflicts during the permitting process (see next solution concept)

3. ASSIGN A TREE SPECIALIST TO THE PUBLIC AND PRIVATE CONSTRUCTION PERMIT PROCESS.

As an alternative to, or along with the solution concept above, a tree specialist would be involved primarily in the permit review stages. A single reviewer would assess the tree preservation plan for both public and private trees at the first and last stages of plan review, visit the site and sign off for both public and private works permits. The first stage of review would be to determine that the root protection zones are all shown in the correct location, and are sized correctly. The final stage would be to review all the changes that have occurred to all (i.e. BDS, PDOT, BES, Water, PGE, Gas, Phone, Cable, Power) sets of permits and reconcile any conflicts prior to permit issuance.

Pros:

- Ensures that conflicts between the parallel permit tracks are addressed early and resolved, and helps ensure that any revisions to site plans that occur through the review process do not create problems and delays in the field.
- Since the trees to be preserved are a fixed point on the site, resolving conflicts between proposed improvements and root protection zones requires an engineering solution to relocate the facility. Once those changes have been designed, the tree specialist can verify that the trees will not be impacted. This serves to maximize the tree preservation and minimize conflicts and associated delays during site preparation or development.
- Establishes a single contact for tree issues which will lead to quicker resolution of conflict, and a more comprehensive and specific evaluation of tree protection issues through the process.

Cons:

- This solution would typically require that the private and public works permits be issued simultaneously. In some cases, this could significantly delay permit issuance and construction work on the project if one permit is ready to go while the other still has unresolved issues. Alternatively, the permits could move independently, but with a single eye on the tree preservation aspect, i.e. through use of collaboration meetings as described later.
- Adds another step to the review process which means more up front time for review, but may be offset by time savings during construction and avoiding further reviews.
- Involving the tree specialist only at the permit stage may be too late, as some conflicts may be inherited by the initial site design reviewed during the preliminary plat phase.

4. DEVELOP COMPREHENSIVE MANUAL TO GUIDE PLAN PREPARATION AND SUBMITTAL REQUIREMENTS.

Each bureau presently maintains its own list of submittal requirements for plan drawings. To assist applicants, these requirements would all be compiled into a single resource and updated in a coordinated fashion (PDOT currently has a similar manual for public works projects, BES maintains the Stormwater Manual, and BDS has a Tree and Landscape Manual for plant installation and Erosion Control Manual). The manual would likely be adopted through administrative rule rather than code, similar to other manuals in the city (e.g., Stormwater Management Manual, Erosion Control Manual). This would enable greater flexibility and ability to update over time. Any changes would be reviewed by all affected bureaus and stakeholders. A section on tree preservation and planting requirements would be included. The manual could also include minimum standards for trade permit submittals to address tree preservation issues.

Pros:

- Provides single source of information for applicants in preparing their site plans and permit drawings.
- Consolidating various bureau requirements would encourage greater coordination
- Could achieve greater consistency between plan submittals which helps speed reviews (less time spent trying to interpret plan symbols, or find particular information).

Cons:

- Unless actively updated and utilized, a manual would likely become obsolete and generally ignored by applicants and reviewers alike.
- Duplicates much of what is already available (but in various locations)

5. SHOW TREE PRESERVATION INFORMATION ON ALL PLANS AND PLAN SHEETS

Require tree preservation and protection details and root protection zones to be shown on each drawing page for all permit packages, public and private.

Pros:

- Would alert reviewers to presence of tree preservation priorities and tree protection areas and highlight construction conflicts in these areas.

Cons:

- Reviewers may not feel compelled to take notice of conflicts on their plan sheets, especially if they are reviewing for technical details like adequate pipe sizing and do not see tree preservation as one of their priorities.

- Tree preservation areas may not be shown consistently or accurately from one sheet to another.

6. COMPOSITE PLAN SHEET.

Require applicants for public works and site development projects to prepare a single composite plan sheet showing proposed work to occur on a site (including grading, public improvements, retaining walls, stormwater facilities, public and private utilities, private streets and driveways, etc.) and the required root protection zones all on a single sheet. This would indicate whether any work was going to occur in or adjacent to the root protection areas. This information is in addition to the plans already submitted.

Pros:

- Would help reduce or eliminate conflicts between one approved set of plans and another, as well as reduce or eliminate conflicts between different plan sheets for different types of infrastructure improvements.
- Indicates at-a-glance if any proposed work is to happen in root protection areas. This serves as a final check for an applicant prior to submittal, and a first check for staff before getting deep into the review process.
- For complicated sites this solution would require basic and early coordination between multiple consultants involved in the plan preparation.

Cons:

- Problems would likely continue to occur as reviewers require changes or redline corrections that change the location of certain elements unless new composite plan sheets were required as well.
- Could create a reliance on the composite plan on the part of staff to ensure that the root protection zones do not have encroachments. For example, if a layer of improvements (e.g. sewers) is left off the composite plan sheet but is reviewed and approved separately on the sewer plan sheet, and the sewer line runs through a root protection zone, then the existing coordination problem persists.
- There are additional costs to preparing this plan for applicants that don't produce plans using automated programs such as CAD, and for projects where multiple consultants are involved in the plan preparation (but such coordination may be even more essential in these cases)

5. CONSOLIDATED PUBLIC AND PRIVATE WORKS PERMIT SUBMITTAL.

Combine public and private permitting into a single permit package for review. This is a slightly different approach from the composite plan or single tree reviewer solution, whereby all the information for the entire suite of infrastructure improvements is represented in a single package rather than shown on a single sheet. The reviewers would only review and approve their particular area of responsibility, but would have all the information in one place for contextual reference. (Similar to current system of combined Site and Building Permits)

Pros:

- Reviewers would be more aware of other related improvements that would not be part of their normal purview.
- Reviewer responsible for tree preservation can cross reference proposed public and private works activities with tree preservation/protection plans to ensure that there are no conflicts with root protection zones.

Cons:

- This solution, in some cases, could create large and unwieldy set of plans. Since each reviewer would see the combined Site Development and Public Works plan sets, the amount of paper used in the plan sets is increased significantly.
- Reviewers may not use the information contained on the other sheets. In other words the additional cost is not leading to a direct benefit.
- Does not resolve the conflicts only makes them known. For instance, if a utility line is shown through a tree preservation or environmental resource area, what forum exists to resolve the conflict? Who specifically is charged with resolving the issue?

Citywide Tree Project

Policy Review and Regulatory Improvement

DISCUSSION DRAFT

Issue Paper

Overview of Tree Preservation Issue Papers

The following four issues papers consider existing regulations pertaining to tree preservation and development. Tree preservation is often a requirement of the Land Division process; is one option to meet landscaping requirements for new residential development; and can be required by the Urban Forester with regard to street trees adjacent to development sites. In a number of similar development situations, there are no tree preservation requirements. To neighbors and the building community, these differences between when tree preservation is required and when it is not can appear arbitrary. From the perspective of the development community, tree preservation requirements do not provide sufficient flexibility in the field. The existing tree preservation regulations do not foster innovative site designs that optimize and integrate tree preservation and development.

Issue Summary

While increasing the urban forest canopy through development is a goal of Portland's Urban Forestry Management Plan, the loss of trees associated with development has generated considerable public comment and controversy. Tree Preservation Plans emerge from land divisions and/or residential building permits and require tree protection measures. However, a number of inconsistencies and implementation issues have been identified that often result in the removal of significant groves of trees and large, native trees. The current regulations fail to consider impacts from development on trees located off-site and can result in preservation of low-value ornamental trees while more desirable trees are allowed to be removed. Further, the required protection measures can add complexity and cost to the development of constrained sites, but are not effective at eliminating unintended harm to the trees.

When existing trees are preserved either through a land division review or through the building permit process, existing tree protection measures have proven to be inadequate to prevent harm from occurring to trees during the many construction-related activities that must be coordinated during the building process. However, because any damage that occurs during development may not result in immediate failure, when a tree designated for protection dies several years later it is difficult to determine if it is as a result of building activities, later actions by a homeowner, or another unrelated cause.

The attached issue papers consider each of the following specific topics in turn:

- Tree Preservation in Land Divisions
- Tree Preservation in New Single Family Residential Development
- Tree Protection Fencing Requirements
- Loss of Significant Trees

Tree Preservation in Land Divisions

ISSUE DESCRIPTION

Land division regulations in the Portland Zoning Code (Title 33) require tree preservation on sites that are to be divided. The regulations provide 5 options to preserve trees during development if feasible, and mitigation options for the loss of trees when it is not. Maintaining the City's beauty and natural history are cited in the regulation's purpose statement along with recognition that trees provide ecological services and increase property values. The purpose statement also emphasizes the value of large trees and native trees.

The overarching goal of the requirement is to address tree preservation within the context of site design and lot layout at the land division stage, before development begins. The land division application submittal must include a tree map, an arborists report and a tree preservation plan.

The current regulations do not direct an applicant to gather information about existing trees and preservation potential prior to designing their site. Tree preservation plans are instead produced in the context of preferred development. This focus on the presumptive development plan during the tree survey can also encourage the forgoing of preservation in favor of the mitigation option, or the broad interpretation of tree exemption criteria to reduce the number of trees subject to regulation.

Developers have expressed concern that the existing regulations and implementation require a greater cost than the benefits they provide, noting that extreme measures are required to save trees to meet the numerical standards of the tree preservation rules rather than the intended purpose of the Tree Regulations.

BACKGROUND

Tree preservation regulations were introduced with the Land Division Code rewrite project in 2002. Zoning code requirements already required tree preservation, planting, or payment into a fund at the time of single family residential construction (the T1 landscaping standard). Provisions were introduced into the land division regulations with the intent of ensuring that trees on the site are considered and addressed in the design and layout of the land division, including an allowance for a limited reduction in minimum density for the purpose of retaining trees. Mitigation options were also included to prevent conflicts between minimum density requirements or other service-related standards including street connectivity, and tree preservation.

Tree Preservation Process in Land Divisions

Tree preservation is required for land division proposals (except for the portion of sites within environmental zones¹) where at least one "significant" tree² or a tree at least 6 inches in

¹ Sites within an environmental overlay zone are instead subject to the Environmental Overlay regulations of 33.430 which define a 'disturbance' area and a 'resource' area delimited by tree protection fencing.

² Significant Trees are listed in Table 630-1 which calls out threshold sizes by species, ranging from 2-inch diameter for the rare Pacific Yew to 18 inches for the Douglas fir and 20 inches for any species not listed as a nuisance or prohibited on the Portland Plant list.

diameter exists on a site. To meet the tree preservation requirements, a tree map, Arborist Report and Tree Preservation Plan are submitted as a part of the land division application along with a Preliminary Site Plan. The code does not require trees to be surveyed or rendered on a plan with the same precision as is required for the site plan. This can create incongruities between the Tree Preservation Plan and the Preliminary Site Plan that are not discovered until conflicts arise in the field.

Tree preservation requirements apply to all trees not deemed 'exempt' on a site. Trees are exempt if an arborist identifies them as dead, diseased or dangerous. In addition, a tree is exempt from tree preservation requirements if it is on a property line, on the nuisance or prohibited plant list, within 10-feet of a structure to remain, in an environmental zone, or is less than 6 inches in diameter and not listed as a significant tree (33.630.030). It is not unusual for a large number of the trees on a site to be exempt from the tree preservation requirements.

Current exemptions are broadly defined and some arborists have indicated that they consider the presence of proposed development when ascribing hazard status. In addition, because these exemptions are defined broadly, differing interpretations can result, and there are no clear mechanisms for resolving disagreements about the status of the trees if they arise. Review staff lack the expertise to identify hazard trees, and at best may consult with the city forester to verify such trees on a site.

The tree preservation requirements apply to non-exempt trees. Several options are provided to allow flexibility in site design. The first option, to preserve 35% of the total diameter at breast height (dbh), is the most commonly selected³. Additional options encourage the preservation of significant trees but are less frequently used. These options include preserving various combinations of significant trees and tree diameter on a site, or 35% canopy on the site if it is larger than one acre.

Smaller land division sites (15,000 square feet or less) frequently use a mitigation option that allows alternatives to tree preservation because preserving trees would impact the ability to provide a "reasonable building site" on each lot. It is important to note that the city allows single-family homes in areas zoned for multi-family development. Whereas multi-family or clustered site design might provide an opportunity to design with the existing trees, city staff has no authority to direct applicants in this manner if they choose to develop single-family homes on sites less than 15,000 square feet in area⁴.

Because these tree preservation regulations are non-discretionary standards, the reviewing planner has little authority to request or require site design changes that would better meet goals for tree preservation (e.g., preserve the largest trees or a cluster of trees). Inspectors report that they frequently see marginal or unhealthy trees being protected, presumably because the trees are in a location where no development will occur.

POTENTIAL SOLUTION CONCEPTS

The following criteria are intended to guide the design and evaluation of potential solution concepts.

³ For example, if a site has four trees that are 10-inches in diameter, but one is on the property line and another is deemed a hazard by the arborist, the total non-exempt dbh would be 20 inches and the applicant could meet the standard of Option 1 by preserving 7 inches of dbh, which would be possible with one of the two remaining trees.

⁴ 33.630.300 the Mitigation Option has three criteria: A. Preserve as many trees as possible; B. Submit a mitigation plan; C. Demonstrate that it isn't possible to meet tree preservation requirements and other service requirements, except for sites under 15,000 square feet which are allowed an easier finding to meet this criteria if a practical arrangement of lots isn't possible while meeting the tree preservation requirement.

Criteria for Solutions:

- The solution should promote the consideration of alternative site configurations to design with trees where practicable.
- The solution should facilitate the and improve the reliability of preservation for mature or healthy trees
- The solution should ensure that the city maintains adequate oversight throughout the land division process, and is accountable for effective implementation of the regulations.
- The solution should foster productive, professional relations with arborists.
- The solution should confirm and clarify city goals for tree preservation and mitigation.
- The solution should encourage urban forestry goals as a component of site design.
- The solution must be enforceable and discourage violations.
- The solution should not create an incentive to violate.
- The solution should include sufficient resources to be effective (avoid unfunded mandates).
- The solution should be easy to understand and communicate to professionals and lay people alike.

The following options represent an initial list of potential solutions to address issues outlined above. The intent of this section is to represent a range of options, each with different strengths and limitations, and to provide a starting point for discussion.

1. ESTABLISH RECOGNITION PROGRAM

Create a recognition program for builders/developers who successfully design around trees. The Arbor Day Foundation and the Oregon Community Tree Group have recognition programs for tree preservation and development design. This could be aided by a Portland-specific design competition highlighting possibilities for site design around existing trees using alternative development option such as common greens, tree tracts and courtyard housing.

Pros:

- *An incentive based program provides visibility for applicants who preserve trees and a means of publicizing techniques of designing to accommodate tree preservation.*
- *A 'peoples' choice' award could assist in developing good will between neighbors and the development community.*

Cons:

- *Uncertain impact on overall tree preservation*
- *Would not address the majority of developments and the cumulative loss from incremental tree cutting.*
- *Additional cost for unknown effect.*

2. CLARIFY 'EXEMPT' TREE CRITERIA

Provide greater clarity regarding the criteria used to determine if trees are exempt from tree preservation requirements. Goals of providing definitions would be to reduce uncertainty, provide standardization, and save trees while more clearly addressing hazard trees. This clarification might include:

- Use ISA standards and definitions
- Require an 'Exempt Tree' Checklist

- Require protection for adjacent off-site trees within a certain distance of the proposed development (which are currently exempt from protection)

Pros:

- *This solution would provide more guidance for planners, urban foresters, developers and arborists regarding the intention of the code with regards to conditions that make a tree exempt from tree preservation.*
- *The solution would broaden the application of tree preservation requirements to both on- and off-site trees*

Cons:

- *Revising the exemption standards might make the standard more complex and confusing, and harder to understand.*
- *Involving off-site trees could raise complicated ownership and access issues.*

3. REQUIRE PRE-APPLICATION TREE ASSESSMENT

Require a pre-development assessment for trees on a site to determine the status of existing trees and which trees or groups of trees would be best for preservation (The overarching issue of the role of the arborists in tree policy is addressed in another issue paper). At time of application, plans would need to show and describe how the site design optimizes tree preservation and development. Combined with Early Assistance Meetings this solution could help prevent problems, reduce uncertainty during the review, and would encourage the examination of alternate design options before development plans are set.

Pros:

- *An objective report of tree conditions and long-term viability would provide City staff with a starting point in working with applicants to design their sites with effective tree preservation in mind.*
- *More clarity around tree conditions and preservation possibilities prior to submitting a Land Use application would expedite the initial review and likely reduce subsequent Tree Reviews or Violations.*

Cons:

- *This would add a step and cost to the Land Division process.*
- *If person doing the pre-development assessment is different from the project arborist, there would need to be mechanisms to resolve disagreements or changes.*
- *Does not address tree preservation challenges for development other than land divisions, or tree protection issues that occur during construction.*

4. EXPAND REVIEWER ROLE FOR URBAN FORESTRY

Increase the role and participation of the Urban Forester in the review of land divisions (and potentially other types of reviews). The Urban Forester would provide comments on arborist reports, development plans and to do site visits.

Pros:

- *Arborist expertise resides with the Urban Forestry division of the Bureau of Parks and Recreation and could more consistently be brought to bear in development review.*

Cons:

- *This solution would also require a mechanism to resolve conflicts between the Urban Forester and the project arborist.*

- *This solution would require either an increase in funding for Forestry inspectors or an increase in fees to pay their costs.*

5. PROVIDE ARBORIST TRAINING FOR PLANNERS AND INSPECTORS

BDS planners and inspectors rarely are trained in tree identification, health assessment or protection techniques, which limits their ability to evaluate or critique arborists' reports and tree preservation plans.

Pros:

- *Such training would improve communication between city staff, applicants and their arborists, would help prevent conflicts, and result in more effective tree preservation plans.*

Cons:

- *Additional training will not make planners and inspectors into arborists.*
- *Currently, the lack of site visits by planners during and after construction, limits the ability of reviewers to know how well the effectiveness of protection methods are.*

6. ESTABLISH QUALIFIED STAFF "TREE REVIEWERS"

As a part of Land Use Reviews, designate a staff tree reviewer to provide technical expertise in a manner similar to Transportation's street review and Environmental Services' sewer review. Tree Preservation Plans and Arborist Reports would be reviewed alongside the other development plans (Site Plan, Clearing and Grading Plan, etc.) by a person with specific knowledge and expertise to assess potential conflicts and opportunities to preserve trees. Tree reviewers would provide comments on land divisions and provide consultation to planners if issues arise.

Pros:

- *Provides early and ongoing technical review of preservation and construction methods proposed by the applicant which would increase the city's accountability for achieving tree preservation goals.*
- *Would increase consistency in city reviews of arborists reports and tree preservation plans.*
- *Would improve city effectiveness in encouraging tree preservation through site configuration.*

Cons:

- *Would increase the cost of the review.*

7. INVENTORY AND DEVELOP AREA-SCALE TREE PLANS

Begin to map and track large stands of trees that will likely be affected by future land divisions and create a desired tree preservation plan (similar to PDOT's map of desired street improvements). This type of plan could foster preservation of tree groves that span several sites and owners. This approach could complement city efforts to protect important natural resources through restoration, willing-seller land acquisition, and regulatory programs (e.g., environmental overlay zone). Combined with a density transfer option, applicants could 'pool' their tree preservation and shift development away from significant groves.

Pros:

- *Would help address significant groves of trees that are often spread across several tax parcels.*
- *Preserving a stand at the corner of several Land Division sites can increase tree retention, while reducing the impact on development potential for singular sites.*
- *Begins to address the issue of the cumulative effect of small divisions on overall tree canopy.*

Cons:

- *Could create additional complexity in tree preservation and in determining development potential.*

8. STRENGTHEN MITIGATION CRITERIA

Limit use of the mitigation option, except as a means to reach minimum density and/or tighten the test for “practicable arrangement of lots.”

Pros:

- *This solution would encourage applicants to configure sites using the full range of available housing types to preserve trees. (Discussions regarding this issue and others that arise regarding density and development can be passed onto the Portland Plan for further consideration.)*

Cons:

- *Limiting the ability to qualify for mitigation instead of meeting tree preservation requirements might hamper the ability of applicants to meet development potential on small lots.*

9. APPLY TREE PRESERVATION REQUIREMENTS AT THE BUILDING PERMIT STAGE

Allow only the removal of trees necessary for streets and utility construction at the land division stage and move tree preservation to the building permit stage. At the time of lot development, include tree preservation in menu of choices that relate to sustainability and environmental goals. Provide incentives (increased density, fee reductions) to encourage incorporation of tree preservation and other measures in the proposed development.

Pros:

- *This solution attempts to elevate the ‘value’ of trees within the development equation to make tree preservation a more meaningful exercise for owners and builders.*
- *Moving tree preservation to building permit stage would make review of preservation plans more tangible.*
- *The solution could tie in with other green building techniques and options*
- *The elimination of the land division requirement would simplify land division review.*

Cons:

- *Does not resolve the tension between tree retention and development on constrained sites*

10. POST SITES WITH APPROVED SITE PLANS, TREE PRESERVATION PLANS, AND CONTACT INFORMATION

Post sites with standard information. Include approved lot configuration, roads, and trees to be preserved and removed. Provide contact information for city staff, developer, contractor and/or arborist.

Pros:

- *Helps inform neighbors and prevents misinformation or confusion*
- *Helps inform contractors of requirements.*

Cons:

- *Time and materials costs.*

Questions or Additional Information Needed:

1. Generally, what is the breakdown in Land Division cases between sites that don't need to meet the tree preservation criteria, and those that use options 1-4 versus those that use the mitigation option?
2. What proportion of approved tree preservation plans are revised, and for reasons?
3. Why is the Land Division 35% tree preservation option chosen most frequently?
4. Does the LEED program provide points for saving large trees?

Citywide Tree Project

Policy Review and Regulatory Improvement

Issue Paper

DISCUSSION DRAFT

Tree Preservation in New Single-Family Residential Development

ISSUE DESCRIPTION

New single family residential development is required to address trees by meeting the T1 landscape standards. These standards require either the preservation of existing trees, the planting of new trees, or payment into the city's Tree Fund⁵. However, in meeting T1 requirements, tree preservation is rarely chosen.

BACKGROUND

During the SW Community Planning process in the mid-1990s, citizens testified that sites were being cleared of all trees before houses were built. They felt that regulatory oversight was necessary to address trees as a part of development review. Concerns included increased erosion, loss of significant habitat, loss of privacy and negative impacts to neighboring trees and property values. Following the Southwest Community Planning efforts, a zoning standard (33.248.020.H, the T1 standard) was created to ensure new single dwelling development (houses, attached houses or duplexes) also includes tree preservation, planting or payment into the Tree Fund.

Tree Preservation Process to meet T1 requirements

New single family residential development is required to meet the T1 requirements of the landscaping chapter. The regulation can be met in one of three ways:

- Preserve existing trees
- Plant new trees
- Payment (in lieu of the first two options) into a tree fund.

The first option, to preserve trees, requires two inches of tree diameter per 1000 square feet of site area. The regulation allows an applicant to count trees that straddle their property lines as well as their neighbors' trees within 5 feet of a property line. No additional incentive is given to preserve large or native trees.

Existing trees count inch-for-inch toward the requirement, but must be protected from construction activities as a site is developed. A 6-foot high fence (plastic or chain-link) is required around the root protection zone, which is placed 1-foot away from the tree trunk (as opposed to the drip line) for every 1-inch of tree diameter. A 10-inch diameter tree would have a fence with a 10-foot radius around it.

The second option allows all trees and vegetation to be cleared from the site in preparation for building, and requires the planting of 2 caliper inches of tree per 1,000 square feet of site area.

⁵ Additionally, development that occurs within the overlay zones including the environmental and greenway overlay zones, and several Plan Districts and Natural Resource Management Plan areas also regulate tree cutting and require tree protection measures.

For a 5,000 square foot site, 10 caliper inches of tree must be planted; an exception is made for sites 3,000 square feet or smaller where 3 caliper inches are required. The minimum required size of a new tree is 1.5 inches in diameter – conifers are measured by height and must be 5 feet high. This option is the one most frequently chosen.

The third option allows the applicant to pay into a tree fund in-lieu-of preserving or planting any trees. Paying into the tree fund is currently set at \$150 per required caliper inch.

Implementation Problems

Information from Bureau of Development Services (BDS) planners suggest that the majority of developers choose to plant new trees rather than save existing trees or pay a fee in-lieu-of preservation or planting. BDS staff estimates that approximately 90 percent of the new housing development they review includes new trees, with about 7-10 percent of new development choosing to preserve existing trees and less than 1 percent choosing the in-lieu fee.

In some situations, such as on smaller lots, valuable trees worth saving are located where the roots may be impacted by the development. In such cases, the applicant can hire an arborist to provide an alternate root protection zone that provides more room for development. The formula for the root protection zone (RPZ) was developed by an arborist and is a simplified application based on a more complex calculation that takes into consideration the tree height, species, and health. An arborist or landscape architect may propose an alternative, smaller protection area based on site-specific factors. The zoning code allows this flexibility in order to preserve trees on small or complex sites. However, the alternative option is rarely used because developers hesitate to spend the additional money and time required to bring an arborist to the site to seek a modified protection zone that the developer is then responsible for should a violation occur. In contrast, the expense of purchasing new trees is moderate, can be scheduled during the construction phase so it doesn't hold up the building permit, and there is little risk of violating tree-related codes. For an applicant, hiring an arborist adds cost and time to the building permit process and protecting trees can limit the house footprint and construction activity on the site.

Interviews with staff suggest that developers view the root protection requirements as a disincentive to preserving trees because they perceive the root protection zone as too large. Conversely, some arborists suggest that the root protection zone is not large enough to adequately protect the tree, and are concerned that trees are fatally damaged during the construction process. Arborists also say that the fencing requirement does not stop contractors from removing or running over the fence. Inspection staff regularly find the fence gone, on the ground during construction, or materials stockpiled within the RPZ.

Preservation of existing trees count inch-for-inch toward the requirement, and on the average city lot of 5,000 square feet only one 10-inch tree would need to be retained to meet the standard. Citizens have pointed out that this does not achieve any significant tree retention, since all the other trees can then be removed. Many of the trees being removed are 18 inches or larger.

The fee in lieu option is not frequently used since the fee is roughly equivalent to the cost of obtaining new trees. Also, depending on the species of tree, the fee may be greater than planting new trees. Generally, this option is considered only where the resulting number of trees is extraordinary and there is inadequate room to plant the required number of trees. Neighborhood advocates have pointed out the tree fund does not channel dollars for tree planting directly back to the neighborhoods where trees have been removed.

POTENTIAL SOLUTION CONCEPTS

The following criteria are intended to guide the design and evaluation of potential solution concepts.

Criteria for Solutions:

- The solution should foster the consideration of alternative site configurations to design with trees where practicable
- The solution should facilitate the preservation of mature or healthy trees or groups of trees
- The solution should allow the city to maintain adequate oversight and accountability
- The solution should confirm and clarify City-adopted goals for tree preservation and mitigation.
- The solution should be equitable, ensuring that in-lieu payments to the tree fund dollars are channeled to areas where trees have been removed or that are tree deficient.
- The solution should encourage urban forestry goals as a component of site design
- The solution must be enforceable and discourage violations
- The solutions should include sufficient resources and adequate tools to be effective (avoid unfunded mandates)
- The solution should be easy to understand and communicate to professionals and lay people alike.
- The solution should reflect and be able to achieve the intent stated in the purpose of the regulation, including preservation of existing trees and protection of the root zone, while also providing regulatory balance.

The following options represent an initial list of potential solutions to address issues outlined above. The intent of this section is to represent a range of options, each with different strengths and limitations, and to provide a starting point for discussion.

1. LINK THE REPLANTING (LANDSCAPE) STANDARD TO THE TREES TO BE REMOVED

Require replanting of trees based on the number, size, and species of trees that were removed, not including the trees within the building footprint, species on the nuisance list, and 10 feet away from the building footprint. This option is similar to the environmental development standards and the tree standards within the Johnson Creek South Subdistrict and Floodplain Subdistrict.

Pros:

- *The option would better compensate for the loss of trees than the 2 inch per 1000 square feet of site area standard.*
- *This option would serve as a disincentive to tree removal by requiring replacement for each tree that is removed, except for those in the area to be developed.*

Cons:

- *The remaining area after construction of the house may leave little area to replant trees based on the number, size and species of trees that were removed.*
- *May encourage clearing of sites prior to building permit review.*

2. PROVIDE INCENTIVES FOR PRESERVATION

Determine a value per tree based on species and size, and provide a credit or some other monetary reimbursement (in several possible iterations, SDC credits, etc) to the developer directly proportional to the size of the tree to increase the likelihood of tree preservation (i.e.,

make it too valuable to cut down). This solution would require additional follow-up to confirm that the tree remained.

Pros:

- *The provision of a monetary incentive to preserve trees establishes a positive approach to tree preservation, in that it recognizes the value of the tree and attempts to “reward” developers who choose to retain trees on a site.*

Cons:

- *This option would have to provide a high monetary incentive in order to prevent the removal of trees on a site.*
- *The credit or reimbursement would have to mirror shifts in land value. It could also lead to a reduction in city revenue if the credit comes out of other city fees, such as the SDCs.*

3. CREATE A TREE PRESERVATION REQUIREMENT FOR DEVELOPMENT

Eliminate T1 landscaping standard which allows applicants to choose between preservation and replanting, and replace with a requirement that a certain number/percentage of trees be preserved if outside the building or development footprint.

Pros:

- *This would require preservation and encourage planning with trees as an initial site design component.*

Cons:

- *Could encourage larger building footprints.*
- *Difficult to administer given the wide variety of sites that are available for development.*

4. ALLOW ZERO FRONT SETBACK TO ENCOURAGE TREE PRESERVATION

Similar to the environmental overlay zones, allow structures to be built closer to the front property line when there is potential to preserve trees in the middle or rear of the property. Also consider providing reduced (not to zero) side and rear setbacks on flag lots or in zones with 10 foot setbacks, and additional approval criteria for adjustments to further reduce side and rear property line setbacks, when the purpose is related to tree retention.

Pros:

- *This provision would allow some flexibility when locating structures on a site.*

Cons:

- *The flexibility is limited for small sites and may not be that useful.*
- *Adjustments require a fee and take a minimum of 8 weeks to process and property owners find the process too costly and time consuming.*

5. EARMARK TREE FUND PAYMENTS TO AREAS WHERE TREE LOSS IS OCCURRING

Add specific instruction to the administrative rules governing the tree fund (option three, pay into a tree fund in-lieu of preserving or planting trees for new single-family development) to direct funds to areas where the option is used (eg, trees are not being preserved or planted).

Pros:

- *This provision would recoup some of the tree loss in areas where preservation or planting is not occurring.*

Cons:

- *The tree fund option is not frequently used, so it may not help areas that are losing trees for other reasons.*

Questions or Additional Information Needed:

1. Research tree preservation/root protection in other jurisdictions.
2. What are other possibilities for tree preservation associated with development?
3. Should tree preservation be expanded to include all base zones, not just residential development

Tree Protection Fencing Requirements

ISSUE DESCRIPTION

Tree protection fencing is required for trees identified to be preserved through the land division process or single family development process (using option 1 for new SF development). The requirement has been problematic to implement and enforce as construction vehicles regularly run over the plastic fence and metal fences are moved away from the tree to allow construction vehicles by and to stockpile materials within the root protection zone. There is significant potential for harm to trees designated for preservation on a site and on neighboring properties arising from site preparation work and construction activity.

BACKGROUND

Implementation of tree preservation plans, whether developed as part of a land division, to meet T1 landscaping standards, or other land use reviews (environmental and greenway) consists of tree protection fencing⁶ and in some cases, other measures required by the project arborist to achieve the goals of protecting the trees. These measures are stipulated as conditions of approval of a land division⁷, environmental review⁸, greenway review, or as a requirement of a building permit⁹.

Implementation in the field

The present implementation of these measures in the field is not effectively serving the intended purpose. Title 33 requires placement of the fencing prior to any clearing, grading, or construction activity and that it remain in place until construction is complete. This is not verified in the field until the erosion control inspection as a part of a building permit is conducted. In practice, work often begins on a site before the tree protection fencing is in place – including demolition, clearing and grading, staging, excavation and soil stockpiling, etc. Further, the

⁶ 33.248.068 B. Construction fencing. - A construction fence must be placed around each tree at the edge of the root protection zone. The fence must be placed before construction starts and remain in place until construction is complete. The fence must meet one of the following:

1. The fence must be 6-foot high orange plastic and be secured to the ground with 8-foot metal posts, or
2. The fence must be 6-foot high steel on concrete blocks.

⁷ 33.630.200.B. Tree preservation plan. - Trees that will be preserved on individual lots must be permanently preserved through a tree preservation plan, as specified in Section 33.248.065, Tree Preservation Plans. Trees to be preserved must be healthy and the tree, including the root protection zone, must be outside of areas proposed for structures, services, and utilities. For the purposes of this chapter, the tree preservation plan must be completed by an arborist or landscape architect.

⁸ 33.430.240.B.2. Construction management plan. Identify measures that will be taken during construction or remediation to protect the remaining resources and functional values at and near the construction site and a description of how undisturbed areas will be protected. For example, describe how trees will be protected, erosion controlled, construction equipment controlled, and the timing of construction

⁹ 33.248.020.H.1. T1, trees. Intent. The T1 standard is a tree requirement for new residential development. It encourages the retention of trees, minimizes the impact of tree loss during development, and ensures a sustained tree canopy in Portland.

plastic fencing is easy to ignore and push over, while the metal fence on cement blocks can be moved out of the way, resulting in premature removal of the protection measures for the tree and root zone. The plastic fence can and has been observed to end up under stockpiled materials or simply wrapped around the tree trunk.

Activities not allowed within the required root protection zone (RPZ), such as construction vehicle maneuvering, material stockpiling, and foundation excavations can occur as a result ¹⁰.

Additional impacts on trees can occur in conjunction with grade changes for storm drainage, public improvements, stormwater swales, or landscaping that are allowed prior to final plat or building permit approval. Trenching for sprinkler systems and private utilities such as cable, phone and gas may take place without addressing the RPZ. Finally, the staging or storage of materials and equipment during construction, or vehicle maneuvering can damage tree roots when tree protection fencing is either not in place or has been shifted.

Violations

Enforcement of tree protection requirements occurs primarily through site inspections connected to building or site development permits, or in response to complaints from the public. The remedy for majority of situations is replacement of the tree protection fencing in the appropriate location, sometimes after the tree has been damaged. In some cases, an arborist report may be required to document that the tree was not harmed. In the most severe cases involving the removal of protected trees, a tree violation will result in a mandatory land use review that will require alternative trees to be protected and/or require mitigation plantings. This topic is discussed in more detail in another issue paper: Violations and Penalties.

POTENTIAL SOLUTION CONCEPTS

The following criteria are intended to guide the design and evaluation of potential solution concepts.

Criteria for Solutions:

1. The solution should result in effective tree protection.
2. The solution should ensure city maintains adequate oversight and accountability
3. The solution should establish clear enforcement guidelines.
4. The solution should discourage violations and should not create an incentive to violate.
5. The solutions should include sufficient resources to be effective.
6. The solution should be easy to understand and communicate to professionals and lay people alike.

The following options represent an initial list of potential solutions to address issues outlined above. The intent of this section is to represent a range of options, each with different strengths and limitations, and to provide a starting point for discussion.

1. METAL TREE PROTECTION FENCING WITH SIGNS

Require metal fencing and signs around the root protection zone. The option for flexible plastic construction fencing contributes to the ignoring of root protection zones, particularly by sub-contractors or operators of heavy equipment. Signs on the fence might contain the

¹⁰ 33.248.068.C. Development limitations. Within the root protection zone the following development is not allowed: 1. New buildings; 2. Grade change or cut and fill during or after construction; 3. new impervious surfaces; 4. Utility or drainage field placement; 5. Staging or storage of materials and equipment during construction; and 6. Vehicle maneuvering areas during construction.

tree protection plan and any alternative tree protection measures as well as contact information for the applicant and the relevant city numbers.

Pros:

- *Rigid fencing difficult to remove or walk and drive over would better establish the RPZ as clear boundary.*
- *Information for both contractors and neighbors about the tree protection plan could reduce encroachment into RPZ's and reduce the number of calls that aren't violations.*

Cons:

- *There will be some increase in costs to developers to rent and install the fencing and provide signs*
- *Rigid fencing does not conform to a site as well as plastic fence to account for slope, etc.*
- *Rigid fencing requires ground penetration which could harm tree roots*

2. EXPAND TREE PROTECTION OPTIONS

Explore additional options for root protection/tree protection requirements, such as placing bark chips and plywood over the top of the root zone, mandatory chain-link fence around root zone, etc. The options should only call for available materials and reflect techniques that have been used in other jurisdiction and/or are approved by arborists and tree experts.

Pros:

- *Having a broader menu of options for protecting trees and root zones, might encourage developers to preserve trees on-site.*
- *These techniques might reduce the construction-related damage to trees by construction.*
- *This option may provide additional flexibility in the field to accommodate construction activity.*

Cons:

- *Allowing multiple options for tree protection makes it more difficult for inspection staff (could be addressed by hiring more staff with tree-related expertise).*

3. RPZ BUFFER

Include a buffer area beyond the required RPZ to account for excavation and form setting (an additional 3 feet for construction access beyond the perimeter of the standard RPZ where buildings and other improvements cannot be located).

Pros:

- *The realities of construction are considered and addressed earlier in the process, and the fence can be kept in one place.*

Cons:

- *Would be just as difficult to enforce as the current RPZ*
- *The RPZ is already supposed to account for excavating, etc.*

4. Create a simpler enforcement process for RPZ violations.

Instead of a land use review, require a an arborist to assess the situation, identify remedies and provide a follow-up report after the remediation takes place. Hold further inspections on work until the remedies and/or penalties are approved.

Pros:

- *This could speed remedies on the site.*
- *Eliminate the use of the land use review process as a “punishment” (although it may be need to revise the tree preservation plan if trees are damaged enough to need replacement)*
- *The hold on inspections would delay completion of the project until the potential damage to the designated trees was addressed.*

Cons:

- *It may be difficult for arborists to assess whether damage has occurred, in part because damage may not be visible or predictable.*
- *The arborist is in a client relationship with the developer and may be uncomfortable having a role in delaying the project.*

5. BOND FOR PRESERVED TREES

Require a bond for trees slated for preservation or to address violations. After a set time period, the bond would be released after a follow-up inspection to confirm tree health. The bond would account for the value of the tree and costs of potential removal. If the trees are healthy, the bond may be released. If not, the city would claim the bond, remove dead or diseased trees, and replant or channel the bond into the tree fund. Note: the timeframe could be made the same as the warranty for other infrastructure a developer is responsible for such as public works items.

Pros:

- *This would provide an incentive to implement tree preservation plans.*
- *It places future health and viability of trees designated for preservation back into the hands of developers.*
- *This would increase the city’s accountability for meeting the intent of the tree preservation requirements.*

Cons:

- *A range of impacts on trees can occur over time and it may be difficult to determine when to release or claim the bond.*
- *The measure would only work if true valuations of mature trees were used to create a significant disincentive for harming trees.*
- *Developers would be responsible for tree health beyond the point in time when they have sold the property. Impacts on trees may be caused by subsequent property owners*
- *It may be difficult or impossible to track down the developer years after the development is completed.*

6. TREE PROTECTION OUTREACH VIDEO

Develop a tree protection information outreach video targeted to developers, contractors and workers, similar to that done by the Texas Forest Service. Post it on-line and play it on the DSC waiting area television. Tree trimming, tree maintenance and regulatory information could also be disseminated via this outlet. This might be an appropriate project for PSU class or seminar

Pros:

- *Waiting area of the DSC already has a TV*

- *Video could be created and produced locally with distribution primarily via the internet*
- *Tie Oregon identity via natural beauty to home prices and trees as amenities that require observing preservation protocols*

Cons:

- *Production costs if professionally done*
- *Can become outdated as codes or implementation practices change*

7. ARBORIST OVERSIGHT AND REPORTING

Require arborist to remain present on-site, and sign-off for each stage of ground disturbance (utility installation, clearing and grading, foundation work, landscaping work). A program analogous to the BDS Special Inspection Program could serve as a model. Arborist reports could be required before certain building inspections can be requested. Tracking preserved trees through the permitting and inspection process requires greater coordination than currently exists, but is also the subject of projects and improvement initiatives within BDS.

Pros:

- *Increases accountability and makes greater use of arborist expertise*

Cons:

- *This would generate additional steps for land use and permit approval processes requiring additional staff time to check the arborist reports.*

Loss of Significant Trees

ISSUE DESCRIPTION

Options within the tree preservation requirements of the land division regulations are intended to recognize and encourage retention of large trees and priority tree species. However, significant trees are not always identified correctly in the field, nor included in tree preservation plans. Landscaping standards that are applied at the time of development do not provide any additional incentive for preserving large trees. Significant trees are not addressed by any other city regulations. The result is a continued loss of significant trees.

BACKGROUND

Large trees are symbolic of the Northwest region and contribute to the neighborhood character of Portland neighborhoods. While the T1 landscaping standard does not include a discussion of significant trees, the tree preservation requirements of the land division code specifically call out threshold sizes by species, ranging from 2-inch diameter at breast height (dbh) for the rare Pacific Yew to 18 inches for the Douglas fir and 20 inches for any species not listed as a nuisance or prohibited tree on the Portland Plant list.

Tree preservation options allow the reduction of the percentage of dbh to be preserved on a site if an increasing number of significant trees are designated for preservation. The following table compares the options when significant trees are present as provided under 33.630.100.A.

Tree Preservation Option	Total dbh to preserve	Proportion of Significant Trees to Preserve
Option 1	35%	None
Option 2	30%	Half
Option 3	25%	Three-quarters
Option 4	20%	All

While meeting Option 1 requires the preservation of at least 35% of the non-exempt tree diameter on the site, Option 2 reduces that percentage to 30% if at least half of the significant trees on the site are retained. Option 3 further reduces the total preservation to 25% if three-quarters of the significant trees are preserved. If all the significant trees on a site are designated for preservation, Option 4 requires only 20% of the total dbh to be retained.

In practice, these alternative options are rarely chosen. Significant trees are often perceived as presenting a larger obstacle to development (due to large root protection zones) than as a benefit in meeting preservation standards despite the alternate options built into the existing code to encourage their retention. Significant groves of mature trees do not provide any numerical flexibility that would create an incentive to retain the largest trees.

The rare trees that are listed as significant at a smaller size can be difficult to identify in the field and look like non-native species which are on the nuisance plant list. The Bitter cherry¹¹ and Black hawthorne¹² are examples. If identified as the invasive variety, the tree is removed from the dbh calculations for preservation requirements. Establishing a tree as significant is only helpful in meeting the tree preservation requirements if there are only a few amid a large number of non-significant trees. Then Options 2-4 provide significant benefits to retaining a majority of the significant trees.

POTENTIAL SOLUTION CONCEPTS

The following criteria are intended to guide the design and evaluation of potential solution concepts.

Criteria for Solutions:

1. The solution should facilitate the preservation of mature, healthy trees and significant tree species.
2. The solution should ensure the city maintains adequate oversight and accountability
3. The solution should clarify City-adopted goals for preservation of significant trees.
4. The solution needs to be enforceable and discourage fewer violations
5. The solution should be easy to understand and communicate to professionals and lay people alike.

The following options represent an initial list of potential solutions to address issues outlined above. The intent of this section is to represent a range of options, each with different strengths and limitations, and to provide a starting point for discussion.

1. INCREASE INCENTIVES TO PRESERVE SIGNIFICANT TREES

Provide greater incentives for retaining (healthy) significant trees on site. This could include new formulae for calculating tree preservation that place greater emphasis on significant trees. This could include taking advantage of alternative development options and modifications to other standards achieved through the tree preservation criteria.

Pros:

- *This would encourage developers to take advantage of the opportunity to design with the best trees on the site.*

Cons:

- *Large trees are not always the most desirable for preservation.*

2. ELIMINATE SIGNIFICANT TREES DISTINCTION

Remove definition and options around 'significant' trees from the land division code

Pros:

¹¹ Prunus avium (Sweet cherry) is listed on the nuisance list and is exempt from tree preservation requirements, while the native Prunus emarginata (Bitter cherry) is designated as significant at 10-inches dbh

¹² Crataegus (Hawthorn) is listed on the nuisance list and is exempt from tree preservation requirements, while the natives Crataegus douglasii and Crataegus suksdorfii (Black hawthorn) are designated as significant at 8-inches.

- *This would simplify the land division tree criteria calculations and findings, reducing the need for planners to check arborist species identification*

Cons:

- *Fails to recognize cultural and ecological importance of large and rare trees.*

3. APPLY MORE SOPHISTICATED ‘SIGNIFICANCE’ CRITERIA INSTEAD OF STANDARDS

A tree review process could potentially provide a holistic assessment of significant trees on a site. Decisions could be based on criteria that recognize site-specific conditions and conditions of the surrounding neighborhood, similar to the review criteria the Urban Foresters use for tree cutting permits.

Pros:

- *This could incorporate a more nuanced understanding of significance and allow planners to provide applicants greater flexibility than tree preservation standards to induce them to keep rare or large trees.*

Cons:

- *It is unclear if applicants would choose the uncertainty of a review over the objectivity of standards*
- *Land Division planners do not have expertise in arboriculture or forestry and would need to draw on the expertise of the Urban Forester.*

4. MITIGATION DIRECTION

Provide better direction on mitigation for the loss of high value trees.

Pros:

- *Tie mitigation standards to additional variables (size, species, etc.) instead of just the current inch-to-inch ratio of tree diameter. Changing the value of large trees in mitigation equations would come closer to fulfilling the purpose of ‘mitigating’ for their loss. Because tree preservation Option 1 requires only 35% of site dbh to be retained, mitigation for a single large tree is only for 35% of the tree’s size. Currently, mitigation for removing a 36-inch diameter Doug fir is to plant six 2-inch caliper trees of unspecified species (although staff sometimes requires native species). Ideally, mitigation assigned via Title 33 should match that assessed by the Forester via Title 20*

Cons:

- *Determining high value or significant trees cannot be reduced to a simple formula but is based on multiple factors including species and context.*

5. ESTABLISH REQUIREMENTS TO ADDRESS SIGNIFICANT TREES THROUGH OTHER LAND USE AND PERMIT PROCESSES IN ADDITION TO THE LAND DIVISION PROCESS

Significant trees would be identified and considered for protection or alternative protection measures during the regular permit review process, or other land use review processes such as design review, conditional use review, etc. If through a land use review process, the review could include significant mitigation options to replace the greater environmental value larger trees provide, to reflect the environmental loss.

Pros:

- *The importance of significant trees would be elevated and likely result in more trees being preserved or at least considered for preservation prior to development.*
- *The environmental functions that larger trees provide would be preserved or mitigated.*

Cons:

- *More complication for site development review.*
- *Could create an incentive to cut trees before development submittal*

Questions or Additional Information Needed:

1. Does the LEED program provide points for saving large trees?
2. How does Forestry operationalize its findings on tree cutting permits regarding neighborhood character, etc.
3. How might significant groves of trees that span 2 or more properties be identified and addressed through the land division process?

Citywide Tree Project

Policy Review and Regulatory Improvement

Issue Paper

DISCUSSION DRAFT

Development Processes That Lack Tree Preservation Regulations

ISSUE DESCRIPTION

There are development processes and activities that have the appearance of a land division but are not actual land divisions, so there are no tree preservation regulations and no restrictions on tree cutting. This causes confusion for both property owners and neighbors since it is not apparent which sites or which activities are subject to tree regulations. These situations also highlight an inconsistent and inequitable approach to tree preservation in City codes.

BACKGROUND

Existing tree preservation rules apply when land is proposed to be divided into additional lots or when a planned development review is requested through the land division process. The tree preservation requirements apply in all zones – single family, multi-family, commercial, and industrial. However, there are several other methods for creating additional building sites that are not subject to the land division process. These situations appear to be the same as a land division because they each result in additional buildable sites.

For example, through the “lot confirmation” process, properties that consist of multiple smaller historic lots (see example on page 3) may have one or more plat lines “acknowledged” and thus create additional building sites. In some cases, restoring the older plat line creates a lot that is very small or oddly shaped. The lot confirmation process is processed administratively, therefore, no land use review or neighbor notification process is required.

Some development proposals also look like subdivisions, but are in fact “multi-dwelling developments” comprised of individual separate houses or duplexes. In this situation a group of individual structures are approved but the land underneath the structures is not divided into separate lots. This development type is allowed by right in multi-dwelling zones and commercial zones and can be initiated with a building permit.

Tree preservation is not required in any of these situations unless the site also happens to be in the environmental overlay zone or within one of several plan districts that limits tree cutting (however, these areas comprise about 17% of the land area in the city, not including several large parks). The limits of the environmental zone and plan districts will be explored further in the Code Complexity Issue Paper. The lot confirmation and multi-dwelling situations are discussed in more detail below.

Lot Confirmation Process

The lot confirmation process appears to create new lots, but actually verifies the legality of a lot that was part of an historic plat. These plats were created, in some cases, more than 100 years ago when individual land owners who owned large acreages wanted to encourage development. The plats were laid out on a grid pattern and created uniform blocks and lots in sizes ranging (most commonly) from 25 X 100 to 50 X 100 feet. The individual lots were not intended to be developed, rather, potential owners were encouraged to purchase multiple lots to design their own size property. Many areas now zoned R7 (7000 square feet per dwelling unit),

R5 (5000 square feet per DU) and R2.5 (2500 square feet per DU) were originally platted as individual 25'x100' lots sold in packages of 2, 3, or more lots.

The lot confirmation process “confirms” that these lots are buildable – usually 25 feet by 100 feet – in developed residential neighborhoods; occasionally a smaller or larger lot may be confirmed depending on the original plat and any changes that may have occurred since¹. In some cases, a lot line is confirmed, then moved using the property line adjustment process to create a slightly larger lot or to reshape the lot. The end result is the building of single-dwelling structures that are 10-25 feet wide and cover the majority of the lot. Often these developments take place in neighborhoods with older homes and large, established trees or groves of trees. In general, most lot confirmations in R5 are taking place in inner North, Northeast, Southeast and more recently Southwest Portland.

The lot confirmation process is a popular alternative for residential development because in many cases it provides an additional lot when the original property would not be dividable under the current land division density standards of the Zoning Code. Even where a property is dividable, using the lot confirmation process also results in more buildable lots but avoids the time-consuming and costly land division review and associated neighborhood notification process. Lot confirmations are processed as an “administrative” procedure and do not require neighborhood notice and cannot be appealed to a local body.



Confirmed lot with tree

Tree preservation is not required in conjunction with lot confirmations or property line adjustments. Additionally, in cases where the original property is not eligible for a land division, Title 20 does not apply either since those regulations apply only to lots that are dividable. Unless the property is in one of the Zoning Code overlay zones or plan districts that includes some sort of limit on tree removal, all trees can be removed without mitigation.

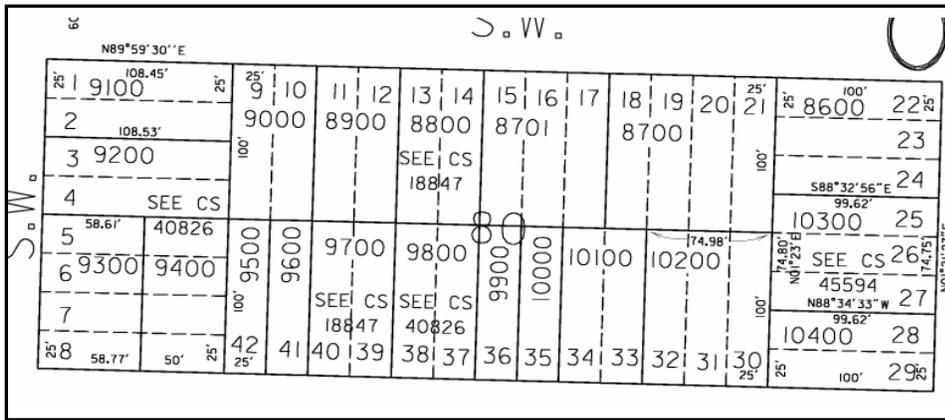
Potential lot confirmations are illustrated in the tax map below, which shows an entire block in SW Portland. The solid lines show where current property lines exist, and the dashed lines show original plat lines. Through the lot confirmation process, a dashed line can be restored as a solid line (eg, the lot is “confirmed”) if the proposed lot can meet ONE of the following four criteria (in the R5 zone):

- Be at least 36 feet wide, measured at the minimum front building setback line, and be at least 3000 square feet;
- Have been under a separate tax account from abutting lots or lots of record on November 15, 2003;

¹ There are 2 areas in Portland where the lot confirmation process may not result in lots smaller than base zone maximum density allowances (eg, R5 = 5,000 Sq Ft lots). In the West Portland Park Subdivision, lots in the R5 zone must be a minimum of 5,000 square feet and lots in the R7 zone a minimum of 7,000 square feet due to infrastructure constraints. In the Linnton Hillside area, lots may not be smaller than base zone density allowance for all single family zones due to infrastructure constraints and land slide hazards.

- Have had an application filed with the city before November 15, 2003 to authorize a separate tax account and have been under a separate tax account from abutting lots by November 15, 2004; or
- Have not had a dwelling unit on it since September 10, 2003, or for at least five years, and not have any portion in an environmental overlay zone.

In some cases where a house may be on the property line that is to be confirmed, the applicant may apply for a property line adjustment to move the line from under the house. This is allowed as long as the “new” lot is not going to be smaller than the minimum size regulated by the Zoning Code.



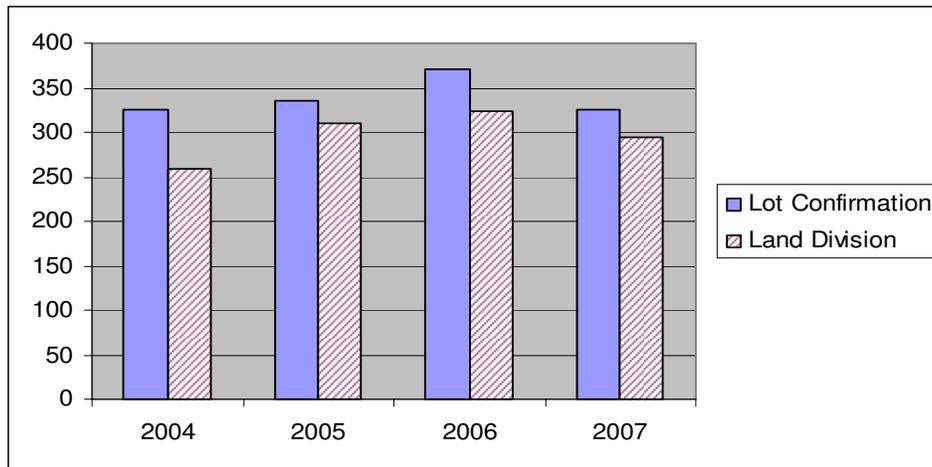
Tax map showing historic platting pattern



Aerial view of tax map

To explore the frequency of the lot confirmation process, staff conducted research on the city’s permitting and process database – TRACS. For purposes of comparison, the number of lot confirmations in a year and the number of land division applications for the same year are presented. A lot confirmation application may include more than one lot line re-establishment; the land division applications are for all land divisions, which include partitions (2 or 3 new lots) and subdivisions (4 or more lots), although it should be noted that 2-lot partitions far outnumber

any other land division (by 3.5 to 1). The table highlights the popularity of the lot confirmation process and also illustrates that the number of lot confirmation applications to “create” buildable lots exceeds the number of land division applications (although the exact number of lots resulting from the lot confirmation process may be slightly smaller than those created through the land division process).



Lot Confirmations and Land Divisions, 2004-2007

The process of confirming a property line has been allowed for many years as an administrative process. The regulations have changed several times over the past few years as citizens have complained about the smaller lots and the impacts to neighborhood appearance and livability. Recent complaints about the lot confirmation process have highlighted some key tree issues including how to comply with city infrastructure, utility, and building code regulations on small sites and retain one or more trees without negatively impacting the roots or trunk, and how to provide adequate screening and privacy between properties.

Developers typically find the smaller lots attractive to build affordable houses for first-time buyers. Although there are no tree preservation requirements when a lot is confirmed, the T1 standard does apply at the time of development. However, many large trees that are removed in these cases are not replaced in kind – they are usually replaced with species that can fit the smaller space. On lots 3,000 square feet or smaller, a minimum of 3 inches of tree are required to be preserved or planted. Because of the smaller-sized lots, it is difficult to build a house and meet all of the utility and infrastructure requirements and still preserve one or more trees.

The Citywide Tree Project is focusing on the lot confirmation process as it relates specifically to trees. Issues that arise from the lot confirmation process include a net loss of tree canopy, impacts to neighboring trees (overhanging canopy, roots), and inequitable application of tree preservation requirements to new building sites.

Multi-Dwelling and Non-residential Development

The Zoning Code does not require tree preservation for development in multi-family, commercial or industrial zones unless a land division application is filed. Non-residential development types are allowed in commercial and industrial zones, and residential structures of any type are allowed in multi-dwelling and commercial zones. Density limits apply in the multi-dwelling zones, but commercial zones place no constraints on density or – for land divisions - lot size.

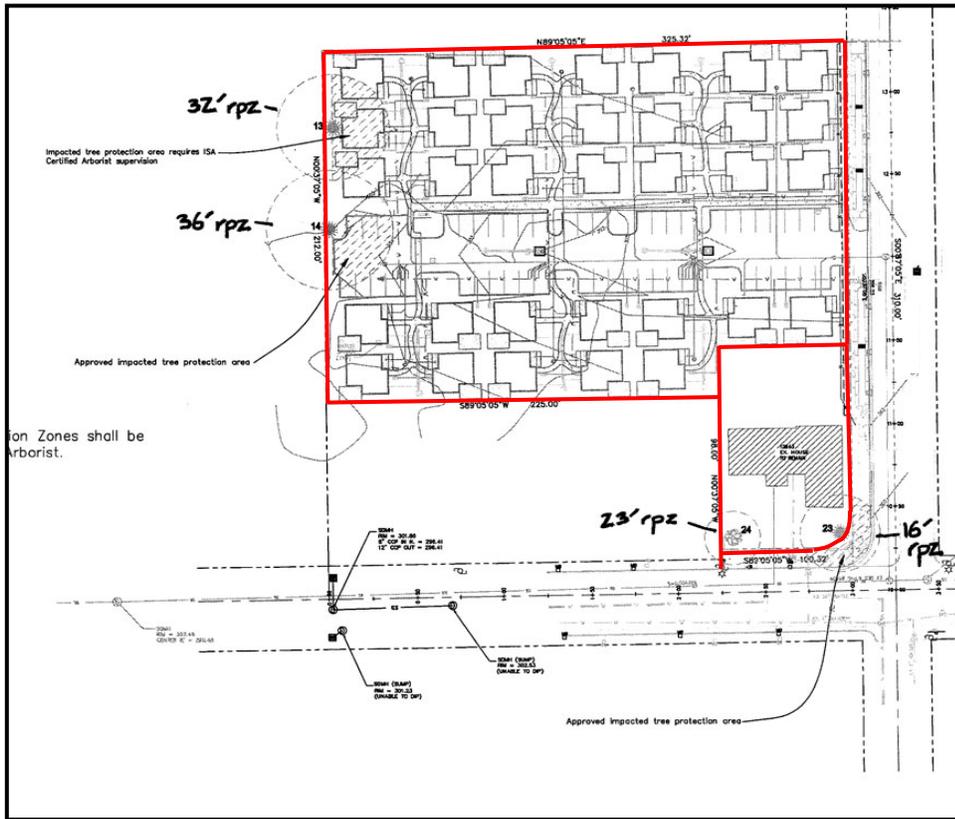
When single-family style development occurs in multi-family or commercial zones, the structures can be rented, or later converted to “condominiums” and sold individually. A developer can apply for a land division during construction or after construction is complete to create a separate lot under each structure, and then sell the units. Commercial or industrial type development could also take place initially and a land division application submitted later. In each case, there are no tree preservation regulations that apply to the development as there would be in a land division situation. The developer may apply for a building permit, and the permit allows clearing, grading, and vegetation removal. There are no limits on tree removal, or mitigation requirements for replacement of trees. The Zoning Code requires a certain percentage of site landscaping (including trees, shrubs and groundcover) at the time of development and although existing trees are allowed to count toward the landscaping requirement, this provision is rarely used. In these situations, trees are allowed to be, and are, removed. When a land division application is submitted after the development has taken place, tree preservation requirements would apply but there may be few or no trees remaining to preserve. An example of condo-style development is shown below, with the land division tree plan on the next page.



Subdivision-like development in the multi-dwelling zone.

The 2006 aerial photograph on the left shows the site prior to development. The parcel is roughly 1.75 acre. A 2007 building permit approved 33 free-standing condominium units, shown partially completed in the photo on the right. Much of the site was cleared and construction started before a land division application was submitted to separate the original house (southeast corner of the site) from the larger portion containing the condominium development. Construction near the few trees that had been retained to meet landscaping requirements weakened their ability to withstand high winds and several fell in a wind storm. The final tree

preservation plan for the site preserves two trees on the very edge of the site and two trees in front of the original house, identified by the root protection zone (“rpz”) below.



Land Division Tree Preservation Plan

In summary:

- Tree preservation and mitigation is not required for development where no land division is proposed but additional building sites are created.
- Land division tree preservation requirements are avoided where development occurs first through a building permit process and a land division is submitted later after the trees have been cleared. The only potential limits to tree cutting occur if the site is within one of the overlay zones or plan districts identified in the zoning code.

POTENTIAL SOLUTION CONCEPTS

The following criteria are intended to guide the design and evaluation of potential solution concepts.

Criteria for Solutions:

- The solution needs to be enforceable
- The solution should not create an incentive to violate
- The solution should allow the city to have adequate oversight
- The solutions should encourage urban forestry goals as a component of site design
- The solutions should include sufficient resources to be effective (avoid unfunded mandates)
- The solution needs to be simple, easy to understand and implement.
- The solution should consider scale of impact and apply regulations accordingly and equitably.
- The solution should clarify City-adopted goals and why they apply to tree preservation and mitigation.
- The solution should provide certainty to applicants and the public.
- The solution should be consistent and equitable, treating like situations consistently.

The following is an initial list of potential solutions to address the issues described above. The intent of this section is to examine a range of possible solutions to help inform discussion with stakeholders and the development of staff recommendations and future decisions.

1. INCLUDE TREE PRESERVATION AS A PART OF BUILDING PERMIT REVIEW

This solution could be designed to apply to some or all types building permits (including plumbing, residential, commercial, zoning, site design, or other activities involving trenching or soil disturbance). It could also potentially include removal or modification of trees preservation requirements in the land division process. Building permit applications would be required to show trees on a site plan (for some permits, the site plan would be a new requirement). Depending on the permit, the process could be designed to ensure that no trees are impacted by the development (eg, plumbing/trenching permits), OR, to identify trees to be preserved per a standard to be determined (new SF residential or commercial permits), removed and/or mitigated. The tree preservation rules could be similar to land division regulations, or could be revised to apply to a wide range of situations, development types, and zones. In cases where the minimum number of trees/canopy/tree inches cannot be preserved, a mitigation option/tree planting standard could apply. Alternatives to the mitigation standard could require tree review.

Pros:

- *This option would close the process gap that allows clearing of a site first and application for land division after a site has been cleared and developed per an approved building permit.*
- *It would apply tree preservation policies to new buildable sites and lots established outside of a land division process.*
- *This option would improve consistency in the city's tree preservation rules by applying the policy to a broader range of development types and uses.*
- *Would reduce confusion as to when tree preservation is or is not required.*

Cons:

- *This option would add a step (staff + time) in the permit review process. Overall, there would probably be some net increase in the amount of time needed to review permits..*

2. ALLOW AUTOMATIC “ADJUSTMENTS” TO SOME BASE ZONE DEVELOPMENT STANDARDS IN EXCHANGE FOR PRESERVING A TREE/TREES

On some sites, the desire to retain one or more trees can make it difficult to meet basic development standards such as front lot line setbacks or minimum building coverage, especially if the tree is large or the site has size or dimensional constraints. Although modifications to a development standard can be requested through the adjustment process, the time and cost of the review discourage use of the process and the tree(s) is usually removed. In the environmental overlay zone, several of the development standards (e.g., front setback) are more flexible to encourage development designs that avoid encroaching into natural resource areas. This option would allow development standard to be modified to promote and assist in preserving trees. The tree(s) would need to be noted in a recorded deed specifying that the tree is to be preserved and replaced when it dies, with a similar tree or a significant tree species. Examples of development standards that could be modified under this approach include reducing minimum lot coverage (mainly in commercial zones), reducing transit street or front setback, allowing a taller structure if the footprint is reduced to preserve trees, waiving the on-site parking requirement in residential zones.

Pros:

- *Would provide an incentive to retain trees without the need to go through the adjustment process.*
- *Allows greater flexibility in preserving trees.*
- *Could result in higher property value.*

Cons:

- *This solution option might create some problems with the root protection zone in some situations.*
- *May be more complex to administer, and has the potential to encourage development standard “abuse”..*
- *Because the solution is optional, it may not, by itself, lead to more preserved trees.*

3. PROVIDE FREE LOT CONSOLIDATION LAND USE REVIEW FOR PROPERTY OWNERS WHO WISH TO PRESERVE TREES.

Current regulations require a land use review and processing fee (\$1,356) in cases where property owners wish to consolidate multiple lots in their ownership (eg, eliminate interior property lines). The consolidation process removes the underlying plat lines and creates one lot. In situations where minimum density would not be affected and there are existing significant trees that would otherwise be affected by development, a free lot consolidation process could be offered to property owners as a way of ensuring that future buildable lots would not be created through the lot confirmation process. Protecting the tree(s) into perpetuity (eg, design a planting replacement plan to be recorded as a deed) can be at the discretion of the property owner.

Pros:

- *Provides an incentive for a current property owner to have input or influence over what future owners can do with the site.*
- *Allows those unique neighborhood tree 'landmarks' to have a greater chance at being retained.*

Cons:

- *Property owners will still need to pay a significant amount for the survey and other county fees to accomplish the consolidation.*
- *This solution will impact only those situations where a land division in the single family zone is precluded, between 40-60% of the cases, and could potentially have a moderate fiscal impact on BDS.*

- 4. PROHIBIT TREE REMOVAL UNLESS THERE IS AN IMMINENT HAZARD OR UNLESS DEVELOPMENT IS PROPOSED; INCLUDE TREE PRESERVATION REQUIREMENTS AT THE TIME OF DEVELOPMENT (AS IN #1 ABOVE).** This option could be limited to apply to removal of trees 6 inches or larger (or another size) and include the usual exceptions for dead, diseased, hazardous trees, OR it could prohibit any size tree from being removed and include a longer list of exceptions and/or allow removal of trees with mitigation.

Pros:

- *This option would significantly reduce tree removal prior to development and/or prior to a land division.*
- *This option would provide more consistency and equity for all development. How?*

Cons:

- *This option would be difficult to enforce unless the number of appropriately-trained code enforcement staff were increased, and/or the violation fees were increased.*

- 5. ADD STANDARDS TO THE LOT CONFIRMATION PROCESS TO ADDRESS TREES** Applications for lot confirmation would identify and show tree(s) on the site. One option might be to require approval of the lot confirmation through a land use review if trees of a certain size or species, or tree groves, would need to be removed in order to develop the lot. Other options might be to allow an additional dwelling unit in another location on the site where the tree(s) would not be impacted; require alternative development options (smaller footprint, reduced setbacks, etc) to avoid impacts to the root zone; or require mitigation/payment into a tree fund for the loss of the trees.

Pros:

- *This option would reduce the number of trees that are removed through the lot confirmation process.*
- *This option would treat lot confirmations, where additional building sites are created, on par with land divisions.*
- *This option could reduce impacts on neighborhood character associated with lot confirmations and subsequent development and loss of trees.*

Cons:

- *This option would not be popular with the development community or property owners, and could discourage lot confirmations.*
- *This solution alone would not, in itself, resolve the issue of people potentially removing trees before they apply for a lot confirmation.*

Questions or Additional Information Needed:

- What is the future potential for continuing lot confirmations – are most of the available lots already developed, or are we only 25% of the total?
- What are the legal ramifications, if any, of reducing the potential for a lot confirmation?

Citywide Tree Project
Policy Review and Regulatory Improvement
Issue Paper

DISCUSSION DRAFT

Regulations for Tree Removal in City Titles

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The various city codes and processes that address trees do so in an inconsistent and uncoordinated manner. A key purpose of the Citywide Tree Project is to identify, evaluate, and assess code language within the City regulatory structure associated with trees, and identify potential solutions that will clarify and streamline the regulations to help achieve compliance with the Urban Forestry Management Plan and related City policies and goals.

City regulations address trees in one of several ways: through tree preservation requirements, or via limits to tree removal, before, during, or after development. Previous issue papers covered regulations that address tree preservation, mainly through the land division process. This issue paper covers tree removal regulations found in city codes and includes information about the particular city code and purpose of the regulation.

ISSUE DESCRIPTION

City codes contain language that explicitly or implicitly regulates tree removal and/or tree pruning. Various bureaus oversee the implementation, inspection, and enforcement of their own or other bureau regulations, with no single bureau in charge. In addition, real and/or perceived gaps and conflicts may arise between city regulations and special district, state or federal regulations. The question “can I remove a tree on my property” can not easily be answered. The public, other agencies, arborists, developers, and city staff find the multiplicity of regulations confusing and difficult to explain or understand.

BACKGROUND

City Code Titles 16 – Vehicles and Traffic, 17 – Public Improvements, 20 – Parks and Recreation, 24 – Building Regulations, 31 – Fire Regulations, and 33 – Portland Zoning Code, regulate tree removal differently depending on location, size, species, land use zone (or development type), and development proposed. The regulations were developed over a number of years to meet various city policies such as the *Comprehensive Plan* and the *Urban Forestry Management Plan*, and this is reflected in the different approaches they take. On a single piece of property, variations in the:

- size of the property,
- size of trees or amount of canopy,
- type of zoning,
- whether it is public land or privately-owned,
- what type of development is proposed (if any),
- if there is existing development,
- whether the tree is in the right-of-way, and
- whether the property is subject to land use conditions (e.g., tree preservation)

are just some of the factors that determine which city codes apply and whether a permit or other review is necessary for tree removal.

Due to the complexity of City code and programmatic responsibilities, it is difficult for citizens and staff to understand and explain which regulations apply to specific situations, and which bureaus have authority. People do not know if or when a permit is required to plant or remove trees and neighbors do not have a consistent point of contact for getting information. In addition, permit processes vary depending on who is applying for a permit, which bureau issues the permit, and where the tree removal is occurring.

The city codes that regulate tree removal, a brief description of how trees are regulated, and any related issues are described below.

Title 16, Vehicles and Traffic

This title addresses vegetation that obstructs the visibility of or for drivers, bicyclists, or pedestrians, or presents a safety hazard, and allows the city traffic engineer to require such vegetation to be pruned or removed. Section 16.70.800 assigns the adjacent property owner responsibility for maintaining visibility and preventing safety hazards. The section also states that in case of conflict with other sections of City Code, the stricter provision applies. Property owners may be unaware of their responsibilities until informed by the city. And when they are told about city requirements, it isn't clear if they are receiving complete information, such as whether the tree is also regulated by the Zoning Code or other city codes, or how to prune the tree, or what to replace the tree with if it has to be removed.

Title 17 – Public Improvements

Title 17 addresses city infrastructure including streets, sidewalks, sewer and stormwater systems. For new public streets, requirements include right-of-way widths for vehicles, pedestrians, and planting strips, or improvements to existing substandard public streets. Private street standards are regulated by an administrative rule (see information under Title 24, below). None of the infrastructure chapters address trees or how to resolve conflicts when significant trees may be in the location of a future street or other utility element, or when improvements or repairs are made to existing infrastructure. One chapter addresses maintenance responsibilities for utilities and streets, including the removal of tree roots that interfere with infrastructure operation (17.52) but does not address issues related to the health or safety of the tree (such as how to properly trench around roots, etc).

When changes occur to existing infrastructure or new infrastructure is installed and tree roots become damaged, the negative impacts to tree health may not show for several years, and then the damaged or dead tree becomes a liability and responsibility for the property owner. In addition, new property owners often do not know where on-site sewer and other utilities are located and may plant trees that later interfere with the utilities that results in tree removal and utility damage. Street tree maintenance and care is the responsibility of adjacent property owners, so any damage causes a tree to die becomes the property owner's problem. Awareness of this issue is increasing, but there is currently a lack of process or code to address the issue.

Title 20, Parks and Recreation

The Urban Forestry division of the Bureau of Parks and Recreation regulates tree cutting on public and private land. The authority to regulate trees on public land and in the right-of-way (20.42) were given to Portland Parks and Recreation in 1972 and the first City Forester was hired in 1974. The purpose of the regulation is, in part, to manage, conserve, and enhance the trees in the city's public spaces. Regulations for cutting trees on private land (20.42) were adopted in 1995 and the purpose is to preserve the wooded character of the City and to protect the urban forest. The two code sections are described in more detail below.

Chapter 20.40, Street Tree and Other Public Tree Regulations, specifies tree cutting permit requirements to remove any tree, regardless of size, on public land including in the right-of-

way (improved and unimproved), parks, and natural areas. Urban Forestry permit review staff apply approval criteria to determine if the permit may be approved. Mitigation/replanting requirements apply inch for inch but the forestry staff can use professional judgment in the field to modify the requirement. There are no exceptions, including for the removal of trees on the Portland nuisance plant list. This sometimes causes inconsistency with Zoning Code environmental and greenway provisions that exempt nuisance plant removal from zoning review. There is some regulatory overlap in unimproved rights-of-way where environmental regulations also limit tree removal, although the environmental rules address disturbance area and trees 6-inches or larger.

Chapter 20.42, Tree Cutting, requires a permit to cut or remove trees over 12 inches in diameter on property where tree cutting is not regulated by other city titles (except for clearing and grading regulations in Title 24), in the following situations:

- Vacant land in any zone,
- Developed property in any zone that does not have a house on it and is not used for single-family use, and
- Developed single-family residential land that can be further subdivided.

Trees are not regulated by Chapter 20.42 when a building permit application has been submitted, when another city code regulates tree cutting, when the removal of trees is reviewed and allowed through a land use review, or for the lot confirmation process or development resulting from a lot confirmation (unless the site is considered “dividable” prior to the lot confirmation or development).

The ordinance was first adopted in 1995 to eliminate wholesale clearing of lots prior to application of a development permit (Ordinance 168486). If the property is developed with a single-family dwelling in a single-family residential zone and cannot be further subdivided, it is not subject to the tree cutting regulations of Chapter 20.42.

For those situations where a tree cutting permit is required, the regulation cites the following criteria that must be met before the tree cutting permit will be approved:

- Trees must be considered dead, dying, or dangerous by the city forester.
- If the tree is healthy, the removal must not have a significant negative impact on erosion, soil stability, water quality, and health of adjacent trees. Mitigation plans are considered when making this determination. Mitigation is provided on an inch-per-inch basis; for example, the removal of a 12-inch diameter tree requires a tree or trees totaling 12-inches to be planted. In general, the optimal mitigation plan will include canopy replacement or improvement with a mix of species as mitigation.
- If the tree is healthy, the removal must not have a “significant negative impact on the character of the neighborhood”. Mitigation plans are considered when making this determination.

The permit process includes posting the site for 14 days and identifying the trees to be cut. The permit request can be appealed. The following data is provided by the Urban Forestry staff.

Estimated Average Annual Tree Cutting Permit Processing

Total requests for information	750
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A. Calls where Chapter 20.42 permit is not required	450
B. Calls where Chapter 20.42 permit is required	300
B.1. Tree removal request part of land use review	100
B.2. Tree removal application mailed to property owner	200
C. Total cases processed - permit applications and violations	100
C.1. Typical permit applications processed	80
a. Permit applications to remove 1 tree	63
b. Permit applications to remove 2 to 5 trees	13
c. Permit applications to remove more than 5 trees	4
C.2. Emergency permits issued (for 1 tree)	5
C.3. Violations processed	15
Violations resolved with Planner help	4
Violations resolved by Urban Forestry only	9
Violations not resolved – require legal action	2
D. Total applications where permit is denied	16
D.1. Permit denied due to negative impacts to neighborhood	8
D.2. Permit denied due to missing or lack of sufficient mitigation	8
E. Total applications where permit is approved	64
E.1. Permits approved because tree is dead, dying, or dangerous	45
E.2. Permits approved due to damage to building and no recourse	13
E.3. Permits approved for healthy trees with full mitigation	6

As identified above, mitigation is required for healthy tree removal. The mitigation requirement is inch for inch – if the tree being removed is 24 inches in diameter, 24 inches of trees must be planted.

Title 24, Building Regulations

Title 24 regulates the design, construction, quality of materials, use, and occupancy of all buildings, structures, and land to provide the minimum performance standards to safeguard the health, safety, welfare, comfort, and security of the residents of Portland. Title 24 also includes standards related to energy conservation, technique, materials, devices, and modern methods of construction.

Chapter 24.70 Clearing, Grading, and Erosion Control (note: the title of the chapter is as specified, but erosion control regulations are now under Title 10. This chapter focuses on clearing, grading, and tree removal.)

Clearing, grading, and tree removal activities are necessary to prepare a site for development. The regulations apply in the following situations:

- A Grading permit (called an SD, or Site Development, permit) is required for all grading operations except for the following:

- Grading in an area, where in the opinion of the Director, there is no apparent danger, adverse drainage, or erosion effect on private/public property, or inspection is not necessary;
 - An excavation below finished grade for basements and footings of a building, retaining wall, or other structure authorized by a valid building permit.
 - Cemetery graves.
 - Refuse disposal sites controlled by other regulations.
 - Excavations for wells or tunnels.
 - Mining, quarrying, excavating, processing, stockpiling of rock, sand, gravel, aggregate, or clay where established and provided for by law.
 - An excavation which
 - Is less than 2 feet in depth, or
 - Which does not create a cut slope greater than 5 feet in height and steeper than 1-1/2 horizontal to 1 vertical.
 - A fill less than 1 foot in depth, and placed on natural terrain with a slope flatter than 5 horizontal to 1 vertical, or less than 3 feet in depth.
- A Clearing permit (called an SD permit) is required in environmental and greenway zones, Natural Resource Management Plan areas (Forest Park, Smith & Bybee Lakes, Pen I, and East Columbia Neighborhood), Johnson Creek Plan District, and the Tualatin River sub-basin (a small portion of SW Portland) and any property larger than 5 acres. Clearing is any activity that removes vegetation and exposes soil.
 - A tree cutting permit (also called an SD permit) for the removal of more than 5 trees 6-inches in diameter or larger on slopes – in whole or in part – that exceed 25%. “Removal” includes root grubbing. This permit is required in addition to the Title 20 tree cutting permit described above, however, no mitigation is required.

The regulations in Title 24.70 were adopted in 1992 for several reasons, including to comply with erosion control provisions in the City’s Clean River Program. Program goals encouraged activities to improve water quality in rivers and streams; since 1992 the Program has been modified several times and has evolved into the City’s Erosion Control regulations. In 1999, erosion control regulations were updated and became Title 10 as a joint effort between the Bureau of Development Review, the Bureau of Environmental Services, the Bureau of Water Works, and the Office of Transportation. The intent of the updated regulations was to assist the City in meeting compliance requirements of the National Pollutant Discharge Elimination System Permit, Metro’s Title 3 Stream and Floodplain Protection Plan, and the requirements of the Endangered Species Act. Although Title 10 does not regulate the removal of trees, it maintains a link to Title 24 and other tree removal regulations by requiring erosion control measures for the soil disturbance that occurs when trees are removed.

Chapter 24.55. Demolition Permits. Title 24 requires a permit to demolish a structure; in most cases, a simple site plan is included in the application and only the structure to be demolished is shown on the site plan. Once a structure is demolished, a building inspector visits the site to ensure that all materials are removed from the site and any other requirements have been met. However, inspectors are finding that clearing and grading or tree removal sometimes occurs with the demolition even though no permit was obtained for that level of work.

Title 31 – Fire Regulations.

Title 31 exercises the police powers of the City to preserve and protect the public health, peace, safety and welfare of the citizens by regulating (in part) fire hazards in structures or on public or private property.

Chapter 31.30.010 Fire Chief Authorized to Establish Access Standards. The Fire Regulations are part of the City's safety regulations, and gives the Fire Bureau the authority to request new street widths, during the land division review process, with "unobstructed" access for fire apparatus as part of a land division. But "obstructed" is not defined and there is no direction for situations where "unobstructed access" requirements conflict with tree preservation requirements or other City requirements. This kind of conflict occurs frequently at the end of the land division review process when the developer has worked closely with city staff to meet other land division design requirements.

Title 33, Zoning Code

The Portland Zoning Code is the major implementation tool of the City's Comprehensive Plan and must be consistent with the land use designations and provide the definitions and standards for implement the Comprehensive Plan. The Zoning Code includes provisions to limit tree removal in certain areas of the city. The chapters or regulations that apply are:

Base Zone Chapters 33.110, 33.120, 33.130, and 33.140 have landscaping requirements that apply when a property is developed or modified. The landscaping standards are described in Chapter 33.248. Other base zone chapters in the 33.200 section may require additional landscaping for special uses, such as for drive-through facilities or cell towers. Plants shown on a site plan to meet the requirements, including trees, are required to be maintained and kept healthy by the property owner, and if any plant dies must be replaced. The landscaping provisions allow existing trees to count toward the total landscaping requirement for a site. In zones that allow 100 percent of a property to be covered with a building, no landscaping requirement applies. However, if surface parking is developed, there is always a landscaping requirement to buffer the parking lot. In addition, stormwater management requirements (Title 17) apply to impervious surfaces greater in area than 500 square feet, and allow vegetated swales to be used to manage stormwater in a parking lot and under many other circumstances. Any tree planting required for other City codes can be used to meet landscaping requirements.

Chapter 33.420, Design Overlay Zone. The purpose of the City's Design Zone is to promote the conservation, enhancement, and continued vitality of areas of the City with special scenic, architectural, or cultural value. Design review ensures that certain types of infill development will be compatible with the neighborhood and enhance the area.

While trees are not always explicitly identified in design guidelines as an element that relates to design review, landscaping is one of many factors considered during the review process. Landscaping and significant trees are frequently cited by applicants or staff as important elements that relate to neighborhood character. However, most design guidelines and standards lack description and guidance regarding neighborhood character related to trees and don't provide applicants or staff with enough of a link between the two to foster meaningful dialogue or inform the review.

Chapter 33.430, Environmental Overlay Zone. The purpose of the environmental overlay zone is to protect resources and functional values that have been identified by the City as

providing benefits to the public. The regulations encourage flexibility and innovation in site planning and provide for development that is carefully designed to be sensitive to the site's protected resources.

The regulations of Chapter 33.430 limit tree removal of all trees 6 inches in diameter or more, in all zones with or without a building permit application but only in the resource area. The transition area, which is the first 25 feet within the environmental zone boundary, does not limit tree removal or disturbance area, and Title 20 does not apply in the transition area or in the environmental zone.

The development standard limits tree removal of trees 6-inches and larger to a maximum of 225 inches with replanting requirements based on the size of the tree(s) removed. When no development is proposed on a property with existing development, tree cutting is treated as the creation of additional "disturbance" and follows a maximum disturbance limit, with mitigation to replace the trees. Removing trees listed on the city's nuisance plant list does not count toward disturbance and/or trigger replanting requirements, but care must still be taken to limit disturbance area. The removal of trees under 6-inches is considered "disturbance", there is no tree replacement mitigation required but the disturbance area needs to be replanted if not covered with a structure. The mitigation requirement allows several options for replanting, including a combination of trees and shrubs to replace cut trees. Nuisance trees are exempt from the environmental regulations but are still regulated by Title 20 if the trees are on public land.

Development standards for utility installation, resource enhancement projects, stormwater outfalls, and public recreational facilities allow trees no larger than 10-inches to be removed, with a mitigation requirement of 3 new trees for every one tree removed. The standards for limited right-of-way improvements regulates trees 6-inches or larger and limits the maximum removal to 225 inches with mitigation of 3 trees for each one removed.

Chapter 33.440, Greenway Overlay Zone. The purpose of the Greenway Overlay Zone is to protect, conserve, enhance, and maintain the natural, scenic, historic, economic, and recreational qualities of lands along the Willamette River. The greenway zone limits tree removal generally by requiring a greenway review if trees or other native plants are proposed to be removed. There is no specific size limit and no mitigation requirement, but the greenway regulations include a planting standard that is applied to all building permits and greenway reviews. Nuisance trees and plants are exempt from review, but not if the trees are on public land where Title 20 regulates tree removal. The Greenway regulations currently do not include specific development standards for projects such as resource enhancement, public recreational facilities, or other limited-types of disturbance such as those found in the environmental zone chapter where limited tree removal is allowed and mitigation is required. In the greenway, all such projects require a greenway review.

In both the Greenway and Environmental overlay zones, there are currently no standards for tree removal for wildfire purposes. The environmental rules have limited exemptions for tree limbing and plant removal within a certain distance of a structure, but for more extensive tree removal an environmental review is required. The city is currently working with wildfire management experts and will be considering options for removal of specific species with mitigation to help reduce wildfire threats on private property.

Chapter 33.445 Historic Resource Protection Overlay Zone. Similar to the Design Overlay Zone, the Historic Overlay Zone protects historic resources such as structures, sites, trees,

landscapes, historic landmark trees, or other objects in the region and preserves significant parts of the region's heritage.

Similarly, the Urban Forester maintains a list of trees identified as Heritage Trees that are to be preserved under Title 20. According to BDS staff, during development and land use review, coordination between the development review bureaus and Urban Forestry is lacking and there is the potential for damage or accidental removal of a heritage tree. In addition, historic design guidelines and standards lack description and guidance regarding neighborhood character related to trees, and don't provide applicants or staff with enough of a link between the two to foster meaningful dialogue or inform the review.

Chapter 33.465 Pleasant Valley Natural Resources Overlay Zone. The purpose of the overlay zone is to protect and conserve significant natural resources in Pleasant Valley, facilitate restoration and enhancement of forests, protect upland habitats, recognizing that existing houses and other existing uses will continue and limited new development will occur in the zone. The regulations include the same limits to tree cutting as the environmental zone but the mitigation option is different – the replacement requirement is based on the area of disturbance and is a 2:1 ratio of replacement to disturbance, so it is not specific to tree removal.

Chapter 33.480 Scenic Resource Overlay Zone. The purpose of the Scenic Resource Zone is to protect Portland's significant scenic resources, enhance the appearance of Portland to make it a better place to live and work, and improve Portland's economic vitality by enhancing the city's attractiveness to its citizens and to visitors. The Scenic Resource Zone includes view corridors and scenic corridors. Within the scenic corridors, the regulation requires trees larger than 6-inches to be preserved unless they meet one or more of seven possible exemptions. Removal of trees that are not exempt require approval through a Tree Removal Review, as described in Chapter 33.853. Nuisance trees are not identified as exempt from the regulation.

Chapter 33.508 Cascade Station/Portland International Center Plan District (CS/PIC), and Chapter 33.515 Columbia South Shore Plan District contain distinct environmental regulations separate from Chapter 33.430 Environmental zones. The purpose of Plan Districts, in general, is to address concerns unique to an area when other zoning mechanisms cannot achieve the desired results. The area in the Columbia Corridor from NE 82nd to the eastern boundary was originally part of the Columbia South Shore Plan District (CSS), adopted in 1993. The purpose of the CSS Plan District is to provide an area-wide approach for conservation of significant natural resources and preservation of resource values in the CSS, a portion of the historic flood plain of the Columbia River in NE Portland.

In 1999 the portion of the Plan District between NE 82nd and the Interstate 205 Freeway became the CS/PIC Plan District to better address the needs of a growing mixed use center located at the intersection of two key transportation corridors – Portland International Airport and Airport light rail. Although the environmental regulations for both plan districts are the same, the landscaping standards for CS/PIC (outside environmental zones) include specific plant species that are not favored for habitat in order to discourage nesting birds. A plant list was adopted for the plan district to help the airport comply with the safety regulations of the FAA. The Portland International Airport has a Wildlife Hazard Management Plan which restricts the number and species of trees, requires minimum spacing, and also allows tree removal to protect the runway approaches and eliminate wildlife conflicts with the airport.

Chapter 33.537 Johnson Creek Basin Plan District. The purpose of the Plan District is to provide for the safe, orderly, and efficient development of lands which are subject to a number of physical constraints, including significant natural resources, steep and hazardous slopes, flood plains, wetlands, and the lack of streets, sewers, and water services. Restrictions are placed on all new land uses and activities to reduce stormwater runoff, provide groundwater recharge, reduce erosion, enhance water quality, and retain and enhance native vegetation throughout the plan district. Chapter 33.537 regulates removal of trees greater than 6-inches diameter in the 100-year Floodplain and South Subdistricts on sites that are within and outside of the environmental overlay zones. Johnson Creek Basin regulations apply in combination with environmental regulations. Trees can be removed within utility easements or when they are within 10 feet of a proposed structure or 5 feet of a paved surface.

Tree retention and special landscaping requirements also apply to sites that abut the Springwater Corridor. The Springwater Corridor trail, an old railroad bed converted to a pedestrian and bike trail, is identified as a transportation, recreation, and scenic amenity and is also part of the region's 40-Mile Loop Trail system. The regulations for the Springwater Corridor allow tree removal within utility easements and proposed roadways

Chapter 33.563 Northwest Hills Plan District. The Northwest Hills area of Portland was the subject of the first study in the city to examine development and land uses within the context of land suitability and the "carrying capacity of the land". In 1982, City Council was faced with questions about the impact of new development on existing neighborhoods and the natural environment, its impact on congested transportation systems, adequacy of fire protection, and lack of sewer service as they considered rezoning for portions of the area. The Council directed the Planning Bureau to undertake a comprehensive study of the Northwest Hills area and recommend an appropriate land use plan to the Planning Commission and City Council. Results of the study eventually resulted in the Northwest Hills Plan District which has been modified several times since it was adopted in 1991.

Although much of the NW Hills area includes environmental overlay zoning, there are additional restrictive rules that apply to trees in the Balch Creek Subdistrict. On sites in this subdistrict that are also within the environmental overlay zone, 90% of the portion of the site in the environmental zone must be retained or established in closed canopy forest at the time of development. On sites less than 30,000 square feet, up to 3,000 square feet of the site may be unforested.

Chapter 33.570 Rocky Butte Plan District. The purpose of the regulations for Rocky Butte are to preserve and enhance the forested areas of the butte, views from the butte, historic architectural elements, and the natural scenic qualities of the butte. Tree removal regulations require that "every effort should be made to locate buildings, easements, parking strips, sidewalks, and vehicle areas to preserve the maximum number of trees" on a site. Trees are allowed to be removed if it is located within or 5 feet from the footprint of a proposed building, is within a utility easement or proposed roadway, or is dead or diseased. Regulated trees are those greater than 6-inches in diameter.

Chapter 33.580 South Auditorium Plan District. The purpose of the Plan District is to protect the unique character of former South Auditorium urban renewal district, with its high-rise buildings, generous setbacks and landscaping, including trees. The Plan District includes regulations for all trees, public and private, although the majority are in the right-of-way or in

parks. Tree removal is processed through design review, and the chapter stipulates that removed trees must be replaced at the site or within the plan district.

Other Processes or Situations

Administrative Rule TRN-8.06 – Private Rights-of-Ways (Streets, Alleys, Common Greens, and Pedestrian Connections). Development of public streets is regulated by the design standards adopted by PDOT and Title 17. Public street improvements are required to include street trees where feasible per Title 20.40.130 of the Parks and Recreation Code. However, private streets (proposed in conjunction with new land divisions) are not public infrastructure and are therefore reviewed by the Bureau of Development Services under the “Private Street” administrative rules. The current rules, adopted in 2002, address stormwater, pedestrian connections, fire access, and construction methods, but did not include requirements for street trees. The Bureau of Development Services is embarking on an update to these rules which would include street trees. One added complication of these administrative rules is how to process waivers, variances, appeals, or adjustments to rule requirements.

City codes that conflict with special district, state, or federal rules. While more difficult to monitor and control, there are situations when tree removal mandated by another agency may seem to conflict with city regulations intended to fulfill other mandates. An example is the conflict with city regulations limiting tree removal in environmental zones on the levees of the managed floodplain in the Columbia Corridor, and the US Army Corps of Engineers requirement to remove trees to protect the levees from damage during a flood event. FEMA insurance requires compliance with Army Corps standards, but two city codes seemed to prevent the removal of the trees – Chapter 33.430 of the Zoning Code, and Chapter 20.40 Street Tree and Other Public Tree Regulations. Currently the City has an agreement with the flood district to waive Zoning Code rules and allow tree removal so that property owners can obtain flood insurance, but when zoning regulations are waived Title 20 regulations apply. The City Forester is working with the flood district and impacted neighborhoods to achieve some level of mitigation for the tree removal.

Issue Discussion

Despite what seems like an excess of tree regulations resulting from the numerous overlay zones and Plan Districts, the overall land area within the city affected by any of the zoning regulations is 27%, including some large tracts of public land such as Forest Park and Smith and Bybee Lakes Natural Area. The attached map indicates the areas in the City subject to Zoning Code tree removal regulations identified above. Chapter 20.42 applies to approximately 70% of the city unless a building permit application is submitted, and the other city code tree removal regulations apply based on the situation.

It is clear from the descriptions of the various zoning regulations that trees play a significant role in the city’s environmental, economic, historic, scenic, aesthetic, and cultural landscape. However, regulating tree removal on only a quarter of the city’s land area limits Portland’s ability to meet canopy goals (even considering that roads and street trees make up 10% of the land area of the city with some overlap of the areas within overlay zones and Plan Districts).

Several of the regulatory tools described above may serve as models for areas of the city that lack limits to tree removal, with exceptions that recognize more intense development areas such

as city and town centers, transportation corridors, and industrial areas, and can allow for appropriate mitigation options for those more intense development areas.

Key Issues Identified

The following issues emerge from the descriptions of City tree regulations:

- Several permit processes do not address trees that may be within the area where work is to occur, resulting in damage or destruction of trees. Examples include utility and infrastructure permits, demolition permits, and street improvements.
- The lot confirmation and property line processes are not regulated by Title 20 unless the lots to be confirmed can also be subdivided. Subdividable lots that create new buildable sites through the lot confirmation process are no longer subject to Title 20 if the new size conforms with the density of the base zone.
- Tree removal is occurring with demolition permits.
- Applicants can obtain site development permits for site preparation, including tree removal, before required land use reviews that have tree protection requirements are submitted.
- Tree removal is not included in the Title 24 Site Development permit if the slope of the site is less than 25%, or if 5 trees or less are being removed.
- “Neighborhood Character” as described in various design guidelines lacks information about neighborhood trees and fails to provide direction to staff when reviewing development proposals.
- Urban Forestry regulations on private property cross-over to land use and geotechnical arenas by addressing neighborhood character and slope stability.
- City regulations address different sizes of trees. The various sizes include: 6-inches or larger, larger than 6-inches, larger than 10-inches, 12-inches or larger, more than 12-inches, and 95% closed forest canopy. Other size thresholds are identified for specific species listed on the “significant tree list” in 33.630.
- Regulations for tree removal overlap in several situations:
 - urban forestry and zoning regulations in rights-of-way
 - urban forestry and building code tree removal permits with clearing and grading activities
 - urban forestry and zoning regulations for public land (environmental and greenway zones and nuisance tree rules)
- Regulations for trees fall short in several situations:
 - transition area of the environmental zone
 - trees affected by lot confirmations

- General lack of coordination:
 - Multiple city codes address tree cutting but the purpose for many of the regulations is related. No one bureau is in charge of implementation, inspection, or enforcement, and knowledge and skills of staff vary.
 - Heritage Trees are regulated by the City Forester. Coordination with the Bureau of Development Services is a challenge to ensure development does not harm Heritage Trees. City-wide tracking of Heritage Trees is necessary so their protection is considered during land use reviews and development permit reviews.
 - Street trees are also required for land divisions under 20.40.110, which requires coordination between the Office of Transportation engineer and BDS planning staff.
 - Utilities on narrow lots usually need to be placed under, or next to, driveways to allow for tree planting. Coordination with other bureaus, such as the Water Bureau and Bureau of Development Services is required but rarely occurs.
- Perceived conflicts between city tree regulations and other agency tree regulations surface from time to time. There is no process in place to help address the conflicts and guide resolution toward optimal solutions.
- Multiple objectives that could be met with tree preservation or planting, such as for stormwater requirements, street tree planting, and zoning code landscaping requirements, are not occurring in an integrated manner; rather, developments are meeting each requirement separately.
- The Administrative Rule that guides private street development is administered by building code officials, who must also process waivers, variances, appeals, or adjustments to rule requirements. So for those instances where street trees are not practicable, who should decide what is reasonable, and what sort of process should be used?

POTENTIAL SOLUTION CONCEPTS

The following criteria are intended to guide the design and evaluation of potential solution concepts.

Goals and Evaluation Criteria for good solutions

- Solutions should result in regulations that achieve City policies without conflicting or overlapping on a single property.
- Solutions should advance the City's Urban Forestry goals, including enhancement of tree canopy.
- Solutions should address gaps, loopholes and duplication in tree removal-related regulations.
- Solutions should establish regulations that are understandable, equitable and as consistent as possible.
- The solution should consider scale of impact and apply regulations accordingly and equitably.

- The solution should be compatible with other regulations, especially development regulations, and not create conflicts.
- Solutions should include creative and flexible approaches to encourage tree protection through development design.

Citywide Tree Project

Policy Review and Regulatory Improvement

Issue Paper

DISCUSSION DRAFT

Tree Inspections

ISSUE

The City's development inspection programs are not currently set up to effectively address tree protection. As a result, trees that are intended to be protected may be damaged through development or violations of City code. In addition, since most inspectors come with backgrounds in construction and not necessarily arboriculture, tree plantings that may not be consistent with approved mitigation or landscape plans are not always corrected.

The Bureau of Development Services (BDS) and the Parks and Recreation Bureau (Parks) Urban Forestry program are the two primary bureaus responsible for tree permitting and inspection. The Parks inspectors are trained in arboriculture but lack a computerized permitting program and are not actively involved in the inspection process for most new development. The Forestry inspectors serve a much different function than BDS inspectors. BDS does not specifically employ tree specialists and its permitting and inspection program is designed for construction related needs and not tree issues. BDS inspectors have a heavy workload as well. As a result tree inspections are infrequent, and trees do not always receive the highest priority.

Meeting landscaping and mitigation requirements has long been the responsibility of the applicant. Landscape concepts are reviewed during the land use review stage. Approved permits reflect land use review decisions and existing regulations. Often, the applicant is responsible for verifying compliance with the approved plans, using their design experts (including arborists, landscape architects and landscape contractors) to address any changes or problems that arise through the construction stages. However, once a project is finalized, there is no standard system in place to monitor the long term performance of these landscape plans.

BACKGROUND

BDS and Parks share responsibility for ensuring compliance with the City's tree regulations through code administration, inspection and enforcement. Each bureau must deal with complicated regulations and implementation / procedural challenges. The Compliance Services and Land Use Services sections of BDS collaborate with the Urban Forestry division of Parks for some tree related questions and violations. This paper will focus primarily on the procedural challenges associated with tree protection, mitigation, street tree and landscaping inspections. (Related enforcement and code complexity topics are addressed in separate issue papers.)

Parks Bureau Urban Forestry Tree Inspection Issues

Parks is responsible for regulating street and public parks trees, and trees that are subject to City regulations outside of the land use review and building permit purview. These responsibilities include permitting tree removal on private property when no development is proposed, with the exception of tree removal on non-dividable already developed single family lots. Parks' tree inspectors are experienced and knowledgeable arborists. A key issue for the Parks inspectors is that their permitting system is out of date. They currently receive and track permit requests, inspections, tree work, and permits by telephone, paper forms, and paper files.

Parks inspectors have explicit criteria in the code for reviewing private property tree removal permit requests and violations. Conversely, the public tree code clearly requires permits and

authorizes penalties, but does not incorporate explicit removal permit review criteria. Tree removal criteria is handled through internal policy guidelines, essentially allowing for the removal of "dead, dying, dangerous or diseased" trees only. The avoidance of codified criteria is intended because a degree of subjective latitude is needed. Other bona fide circumstances and case by case rationale are often significant considerations in decision making. Since policy criteria is less strict and more difficult to communicate than codified criteria, property owners occasionally feel that decisions are inconsistent, too subjective and sometimes personal. Another issue Urban Forestry inspectors are challenged with is the long term performance monitoring of replacement street trees.

Parks employs four "area inspectors" that respond to street tree and park tree issues, and four "development inspectors" that work with BDS and the Office of Transportation (PDOT). The four area inspectors issue street tree pruning, planting, root cutting, and removal permits. They also respond to emergencies, such as tree failures in City rights-of-way and parks. These inspectors are also responsible for reviewing park development plans and projects. The area inspectors write park work orders and manage interagency agreements for tree maintenance on other City properties, such as golf courses, fire stations, water tanks, and sewer pump stations. Public tree violations are almost always complaint driven via phone calls from the public, and are not tracked separately from other permit requests. The four area inspectors inspected 7,050 sites last year and approved 561 removals.

The four development inspectors review development plans. One inspector works with PDOT on public works projects, including sewer and water projects in public rights of way, and three inspectors review about 3,500 residential and non-residential development plans and sites per year. The purpose of the reviews is primarily to address street tree protection and planting, but also protection of the 285 Heritage Trees in the city. Two of the inspectors review private tree cutting permits and violations of Chapter 20.42 which restricts cutting of 12" and larger trees on developable properties. Of about 100 of these cases a year, approximately 10 percent are violations. The development inspectors also manage the Heritage Tree program and respond to tree emergencies after hours and on weekends where a public tree has become an imminent hazard or has failed/fallen.

Parks has also entered into an inter-bureau agreement with BDS to provide a half time arborist position to provide technical assistance with land use reviews, specifically land division applications. These development inspectors also help with Environmental Reviews, Clearing and Grading permits, reviewing violations of Chapter 24.70 (Clearing and Grading), and general tree permit questions.

For Parks, the main challenges include:

- **Deficiencies in permit tracking technologies.** While Parks is presently exploring options for a computerized permit system, such a system is not currently in use. This means that permit records are kept in paper form, and are subject to damage, loss, or destruction. They are difficult to query and in turn make it more difficult to manage resources. Responding to citizen inquiries of whether a property owner has obtained a permit is difficult and can be further hampered if the area inspector is not available. Since permits are administered through the Urban Forestry Office in Delta Park in North Portland, the office is not centrally located or convenient to many Portlanders. As a result, a majority of the applications are handled through the mail.

- **The lack of clarity in code responsibility.** Title 20.40, Public Trees, is not specific in establishing the responsibilities or liabilities of property owners and the City for street tree maintenance, hazard remediation, clean-up of failures or vandalism, replacement, and establishment care. The code does require property owners to maintain trees to meet clearance requirements over streets, sidewalks, and street signs. It also allows the City Forester to remedy many safety deficiencies and requires property owners to obtain permits if they wish to prune or plant street trees. However, the code is not clear on the issue of routine maintenance for tree safety and tree replacement.
- **Lack of a standardized procedure, particularly for street tree removal permit requests.** Under the present system, a property owner or contractor will call to have an application mailed, or obtain the application form online and print it. The application is then returned by mail or hand delivered to the Delta Park location for processing. An inspector will inspect the tree, however, unless the tree is hazardous or diseased, there are no clear criteria as to when removal would otherwise be allowed¹. In terms of determining mitigation requirements the code provides considerable discretion. While the code authorizes the Urban Forester to require tree replacement, there is no clear mitigation standard² for street tree replacement. This is in contrast with the standard found for private tree removal³ although both codes lack direction as to appropriate replacement species or stature.
- **Increasing oversight responsibility for private tree removal without a corresponding increase in inspection staff.** When the land division code rewrite was adopted in 2002, many more parcels fit the descriptor of “dividable” property, and are thus subject to Title 20.42. Rather than regulating large, subdivision-sized parcels, regulations are more often applied to lots 10,000 sq. ft. or less in size. All corner lots are considered to be potentially dividable and many residential neighborhoods have been zoned for higher density. With increased applicability came increased demand on staff time and resources but no additional funding to accommodate the increase.
- **Lack of interagency permit coordination.** The current record-keeping system is not coordinated with other development activities in the City. As a result, staff from other bureaus do not have access to information on what other types of review or enforcement activities related to trees are occurring on particular properties.

Bureau of Development Services Tree Inspection Issues:

The Zoning Code requires tree preservation for sites undergoing land division, activities in the environmental, greenway, and scenic overlays, in some historic areas, and for development in Johnson Creek, Rocky Butte and the South Auditorium Plan Districts. In some instances, an applicant may also opt to preserve existing trees to meet landscaping requirements for building permits.

¹ Section 20.40.090 stipulates the criteria for removal, including infection or disease that could infest other trees, interference by roots into sewers or water lines, and trees that extend into the public right of way that are of “age, disease or other debilitating cause, death, insecure root system or any other condition which, in the opinion of the Forester, causes its continued existence to be detrimental to the public interest.”

² Section 20.40.090 “The approval of a [street] tree removal by the Forester may be conditioned on replacement with a new tree of approved variety if the Forester finds the replacement necessary to maintain an ornamental tree system on the street, block or portion thereof.”

³ Section 20.42.100 “Tree replacement shall be determined according to the DBH of the tree to be removed. The total DBH of the replanted trees shall equal the DBH of the tree to be removed.”

When trees are required to be preserved, the protection methods listed in Section 33.248.068 must be shown on the development plans prior to land use review approval and/or permit issuance. The Zoning Code specifies two options for tree protection to prevent damage during site preparation and development⁴. However, feedback from citizens, arborists, and inspectors indicates that current tree protection measures are not always followed, may not function properly, or are not being continuously maintained by developers and property owners during development. Failure to follow or maintain required tree preservation measures may result in damaged or destroyed trees⁵.

In addition to requiring tree preservation in conjunction with certain types of development, the zoning code also requires tree planting as part of required landscaping for many types of development or as part of a mitigation plan approved through certain types of land use reviews or plan checks. The tree planting is verified with the final inspection. Sometimes, trees are not planted, planted in the wrong location, or are the incorrect species or size.

The issues surrounding inspections for tree planting and for tree protection differ for several reasons. Only one inspection is required to verify that trees have been planted, but tree protection inspections require repeat site visits to ensure the existing trees are not damaged throughout the development process. Newly planted trees are easy to replace if they are not correct, and in that sense they are “fixable”. Existing trees that are to be protected cannot be readily replaced, only mitigated for. Finally, whereas tree planting can follow a fairly rigid and simple set of standards, tree protection is often an art that requires a great deal of specialized knowledge and discretion.

Two groups of inspectors within BDS respond to tree-related issues in addition to other construction or development-related duties:

- Site Development inspectors oversee site preparation and building permit-related construction (including construction management measures, pre-construction erosion control, tree protection fencing, landscaping and permanent erosion control measures) and private infrastructure construction.
- Code Compliance inspectors respond to a wide variety of zoning code infractions including (but not limited to) tree cutting, violations in environmental zones, building code issues, and other work without permits.

When a development application is reviewed, staff will verify that the plans show the required information to demonstrate compliance with various City requirements, including tree protection measures or landscaping requirements. After the permit is issued, but before actual work begins on a site, the developer is required to install erosion control and tree protection measures (when applicable) and request an initial “pre-construction” inspection by the Site Development inspector. Throughout the development, additional inspections by various building inspectors are requested by the developer, but typically these inspections only relate to structures. If a site-related complaint is received, the Site Development inspector will return to the site to investigate. If a site complaint is deemed to be a violation of a zoning requirement, the case is referred to the Code Compliance inspectors. The Site Development inspector returns to the site at the end of the project to conduct a final erosion control and landscape inspection.

⁴ 33.248.068 sets a specific standard for the required tree protection area along with a list of activity that is prohibited within the protection area. As an alternative, the applicant’s arborist or landscape architect may specify other measures, if such measures will afford the same level of protection for the tree.

⁵ Nelda Matheny and James R. Clark, *Trees and Development*, (Champaign, IL International Society of Arboriculture 1998) p. 115

In lieu of city inspections, certain permit applications may use a self certifying method of compliance called "Third Party Certification". This applies to sites where more than 8 trees are to be planted or preserved or when there is more than 5,000 square feet of landscaping. However, the third party certification process was designed for plant installation, and not specifically tree protection, requiring only that the landscape contractor or arborist certify that "the landscaping at this site was installed according to the approved plans."⁶ Even so, the Third Party Certification can be used to verify tree protection on sites with more than 8 trees⁷.

Key challenges relate to the timing and sequencing of tree inspections, staff expertise in tree issues, staffing resources generally, complex and sometimes ambiguous nature of the regulations, and protocols for corrective action.

Timing and Sequence of Inspections:

In development situations, tree protection measures are inspected when the pre-construction erosion control inspection occurs. Installation of the tree protection and erosion control measures (e.g., tree fencing, silt fencing, etc.) is supposed to occur prior to any other work on the site. According to Site Development inspectors who are specifically charged with the initial tree protection and erosion control inspection, work often begins on a site such as a foundation digout or clearing before the erosion control inspection is requested. This can occur when contractors bypass the initial erosion control inspection. When an inspection is requested, the City's automated inspection system will alert the caller that they have not obtained their required pre-construction erosion control inspection. However, the caller can still proceed to request the other inspections after the message has played.

If damage appears to have occurred to the trees that are to be protected, the Site Development inspectors will check with the Land Use Services staff who reviewed the application to verify requirements, and often require the applicant's arborist to perform an inspection of the tree and furnish a report. In cases where a tree that is supposed to be protected has been removed, the case is referred to Compliance Services who will investigate the site and confer with the project planner before instituting corrective action against the responsible party.

In order to be more effective, tree inspections should take place at multiple, often unpredictable stages during development. Site Development inspectors visit the site at the initial pre-construction erosion control inspection and do not return to the site until the final permanent erosion control inspection, unless a complaint is filed. Other building inspections (foundation, framing, electrical, etc.) are triggered by a phone request and are required for a contractor to proceed with the next phase of the building. If the inspection is not approved, problems are noted as corrections and a reinspection is typically required. Conversely, tree protection is an on-going performance requirement, and is not dependent on any stage of construction other than prior to the initial site preparation. Depending on the work that will occur on a site, tree protection fencing may need to be temporarily moved (e.g. to set forms or locate a pier foundation). Once that work is completed, the fencing must be reestablished so that additional impact to the tree does not occur. This is frequently where problems arise because either a) the temporary disturbance was not approved by the project arborist, or b) the protection fencing is not put back. Also, land use conditions of approval often specify that encroachment into the root protection zone (RPZ) may occur under the supervision of a certified arborist. However, there are no means for verifying that the arborist is actually present when needed or that any of

⁶ Bureau of Development Services, *Landscape Certification Form*, rev 01/10/06

⁷ Ref: 07-105055 SD.

the arborist's recommendations or requirements are implemented in a timely manner. Random or more frequent planned inspections throughout the development process could improve compliance with the root protection requirements.

Inspector Tree Knowledge

BDS is responsible for inspecting trees to be protected during development of private property located in certain plan districts (Rocky Butte, Johnson Creek, and South Auditorium), overlay zones (environmental, greenway, and scenic), and where trees are addressed through land use or building permit reviews. BDS also has responsibility for inspecting general landscaping requirements of the zoning code. The BDS Site Development inspectors that are responsible for checking tree protection measures, tree planting, and other tree and landscaping requirements on private property typically come from backgrounds and training specific to building and construction practices, not tree and plant specialties. For large or complex planting and preservation permit related requirements, the Third Party Certification process is required instead of the Site Development inspector documenting the plantings have been installed. While this process allows for review by more knowledgeable tree and plant experts, the City has relegated some of its oversight and accountability for initial compliance. Moreover, the process only requires certification of proper plant installation and does not specifically address tree protection throughout the development process. It relies on the signoff at the end of the process that the tree is still standing.

As the City has established more tree and other site and landscaping requirements over the years, the number of items that inspectors are expected to verify on a site has also increased. This requires more of their time and specific knowledge sets. For tree protection, the inspectors generally rely on Land Use Services or Urban Forestry staff and the applicant's expert to determine proper root protection zone areas and assess degrees of damage that may be inflicted on a tree. A lack of tree-specific knowledge can lead to inadvertently missing situations, such as washing out concrete near the base of a tree, or stockpiling dirt on roots, that if left uncorrected may result in severe detrimental impact to the tree.

Similarly, the BDS code enforcement staff responsible for responding to Zoning Code violations also lack tree-specific expertise. There are no certified arborists or landscape architects within BDS' inspection staff. BDS does however have an agreement with Urban Forestry to consult with an Urban Forester on Land Use Reviews, permit reviews, inspections, and complaint investigations. These complaints are responded to by a Senior Planner with expert knowledge of the Zoning Code requirements for trees and tree protection. The Senior Planner works with Land Use Services and the Urban Forester for tree-specific information as well as working with the responsible party and /or their design team and arborist.

Staff Levels and Funding

Four BDS Site Development inspectors are responsible for approximately 900 inspections per month, or an average of approximately 10 inspection sites daily for each inspector. That limits the time available at each site to do the necessary inspections, as well as the associated time to investigate complaints and time back in the office to enter the inspection results in the permit database system. Given the multitude of requirements that must be inspected on a site and the demands on the inspectors' time, the time involved in investigating complaints and the limited resources available, priority is given to the most glaring problems and those with direct life and

safety implications⁸. Thorough inspection of street tree planting for proper species and installation quality routinely does not occur.

The Code Compliance section is comprised of 5 Zoning Code inspectors and a Senior Planner who respond to complaints as well as conduct inspections of “zoning” permits (i.e. permits to cover Zoning Code requirements where a building permit is not required, including landscaping and mitigation requirements). In 2007 there were 1517 total code compliance complaints plus 335 zoning permits. In the same period, there were also 15 tree review and 5 tree violation cases, as well as 5 environmental zone violation cases.

Complex and Ambiguous Regulations

Tree protection requirements are inconsistent between different jobs (arborists may specify varying protection programs), between different sites (many sites do not have regulated trees as discussed in prior issue papers), between different trees (some may be protected as regulated while others are retained voluntarily) and between public and private development (protection standards for right of way trees and trees on public property don't always receive the same level of protection required of private developments). The result is that inspectors may not always know what to expect on a job site when they observe encroachments into a root protection zone. While a copy of the approved plans is required to be on a site, this may not always be the case. In some cases even the plans themselves are not clear as to what the protection requirements are, including references to arborist reports or not clearly specifying fencing materials or protection distances from trees. Another issue that complicates the inspector's job is when the root protection zone is modified without the inspector's knowledge. This often occurs when a problem arises in the field (such as an over-excavation, or other unapproved intrusion into the RPZ), and the project arborist submits a report justifying the action after it has occurred. Since the code allows the project arborist or architect to submit a statement that the arborist/architect plan provides the same level of protection as the standard protection requirements, this can be processed as a revision to the approved permit. A copy of the approved revisions is also required to be on-site and available for the inspector to review. However, the revised plans often do not make it to the job site, which creates confusion in the inspection process. When the revised plans are presented to the inspector, there is frustration at receiving a report that sanctions the encroachment after the fact. Inspectors can also be frustrated if the revised plans do not make it to the site because they may then ask for corrections that are unnecessary.

Protocols for Corrective Action

If a problem is discovered with the tree protection measures outside the normal inspection process (i.e. after the initial pre-construction erosion control inspection), it can take a long time to assess a situation, contact and work with the responsible party, educate him or her on what needs to be done, and ultimately get the corrections made, and then reinspect the site for

⁸ From the BDS Employees Handbook:

9.2 PRIORITIES

Inspectors get requests for inspection from different sources and with different levels of urgency. The following is a list of bureau-wide priorities for inspection, from most to least important. It is provided as a general guideline, but supervisors or senior inspectors may assign different priorities as circumstances require:

1. Life safety or health issues that create an imminent danger to public health or safety.
2. Called inspections, Hearings Officer/Code Compliance referrals, and referrals from the Office of the Commissioner, Mayor, or BDS management.
3. Referrals stemming from fire damage or zoning inquiries.
4. Any other complaint investigations that do not involve immediate life safety or health issues.
5. Backlogged inspections, including violation cases.

If you don't have enough called inspections to fill the workday, assist other staff who may have too many requests or make inspections lower on the priority list. Talk to your senior inspector or supervisor for advice on determining priorities or handling difficult cases.

compliance. If the problem relates to potential damage, such as boring utilities through the RPZ, then this activity is not allowed to occur until the project arborist assesses the situation, approves the work, and submits a revision to the permit if this was not already approved. Minor infractions, such as removing debris from the RPZ are usually corrected in a timely manner.

The site development inspectors generally perceive themselves to be quality control experts, and not enforcement authorities. This perception favors a customer friendly, problem solving approach to mistakes made on jobsites. This is largely desirable, except that tree damage cannot be easily corrected once it occurs. In addition, current practices may give contractors and their sub-contractors the impression that the City does not place great importance on tree protection. Also inconsistent application of the rules may cause contractors to feel singled out when inspectors pursue violations or impose penalties.

Optimally, tree inspectors should focus on early communication, preemptive education, and problem solving before the fact. However, the regulations, inspection, and enforcement processes must be strong enough to deter violations and impose appropriate consequence when violations do occur. The degree of consequence can vary based on severity or frequency of violations, but is necessary to reinforce the importance of observing the protection requirements. Site Development and Compliance Services staff have been working on a better protocol to deal with tree preservation infractions during the development process. The new guidelines will provide better information to the responsible party, hold them responsible for continued violations, and better respond to citizen concerns regarding alleged and/or confirmed violations.

Citywide Tree Project

Policy Review and Regulatory Improvement

Issue Paper

DISCUSSION DRAFT

Violations, Enforcement, and Penalties

ISSUE SUMMARY

Under the current regulations, once a tree violation has occurred, the City struggles with how to remedy the problem. Unlike other code violations where the damage or non-compliant structure can be rebuilt or removed, once a tree has been damaged or removed, there is no simple solution to restore it. The current enforcement process is lengthy, with sometimes disproportionate penalties, and requires a lot of staff time. Also, because trees can be removed quickly and because the current regulatory structure is complex, it often is not clear whether a violation has in fact occurred. Sometimes the complaints that are reported do not always rise to the level of a violation. Enforcement staff must consider the extent of an infraction, determine whether the damage is real or superficial, and determine the proper recourse. Consequently, infractions of the various tree regulations are not always reported, or tracked as violations.

BACKGROUND

How violations are reported

Tree related violations are discovered either during a staff site visit or through public complaints. The majority of the BDS Compliance Services Section and Parks Bureau enforcement work is primarily the result of public inquiries and complaints. The Urban Forestry inspectors will also take notice of street trees that have been removed, since they are familiar with their particular area to know whether a permit has been issued. The BDS Site Development Inspection staff can also discover violations during an associated inspection of erosion control measures. This is often the result of work beginning on a project prior to the pre-construction site inspection. Site Development Inspectors will also respond to and investigate public complaints during the project. Compliance Services Inspection staff will respond to public complaints and cases that are referred by the Site Development section. Complaints from and enforcement by non-Urban Forestry, Site Development and Compliance Services inspection staff¹ for tree related matters is uncommon.

Determining what is a violation

Technically, a violation of the tree protection requirements occurs when activities damage or remove a tree that is required to be protected or is otherwise regulated by Title 20 (Parks and Recreation) or Title 33 (Zoning). However, it is often challenging to determine which actions that constitute “damage” are violations; the following situations illustrate the complexity of the issue:

- Extreme pruning - Under Title 20, pruning a street tree without a permit is a violation. Utility companies prune trees in the right of way under a general blanket permit. Under

¹ The Bureau of Development Services has several inspection groups including Electrical, Plumbing, Structural/Mechanical within the Commercial Classification, “Combo” Inspectors for Residential Class structures, and Facilities, Special and Major Projects Inspectors for specific permit types. Site inspections are handled by Environmental Soils inspectors and Site Development inspectors. The Compliance Services Section includes inspectors to investigate and enforce construction code violations (where there is no active building permit), zoning violations, and noise complaints. The Neighborhood Inspection Section includes inspectors to investigate and enforce Title 29-Property Maintenance Regulations relating to housing and nuisance violations. There are a total of 93 inspectors within BDS.

Title 33, it is a bit more complicated: it may be a violation if such pruning occurred in an environmental zone and did not meet specific exemptions. “Topping,” a severe form of tree crown reduction, is also prohibited for trees that are protected (i.e. tree preservation) or required (i.e. planted landscape or mitigation trees) by the zoning code. However, there are exemptions to this prohibition for pruning actions to remove safety hazards, dead or diseased materials, or avoid overhead power lines. Additionally, there is no further guidance within the zoning code or landscaping manual as to what level of pruning constitutes a violation.

- Knocking the bark or a large limb off a tree - Like the pruning situation, for a regulated tree, it depends on the extent of damage. Under Title 20 this action may constitute a violation, since “cutting” means “felling or removal of a tree, or *any procedure in which the natural result will lead to the death or substantial destruction of a tree.* Such acts include but are not limited to the severe cutting back of limbs to stubs larger than three inches in diameter; and damage inflicted upon the root system of the tree.” However, under Title 33, it’s even less clear. Title 33 prohibits the following development within the protection area: new buildings; grade change or cut and fill during or after construction; new impervious surfaces; utility or drainage field placement; staging or storage of materials and equipment during construction; and vehicle maneuvering areas during construction. There is nothing specific about prohibited actions within the protection area, such as bark abrasions, that may harm the tree itself.
- Driving construction equipment next to a regulated tree - For trees that are subject to preservation and protection requirements – it is a violation to drive or store equipment within the required root protection zone without the project arborist’s approval and supervision. However, for trees not subject to a land use condition or building permit preservation requirement this is not a violation. Adding to the confusion, on a work site where tree preservation requirements are in effect trees retained voluntarily are not subject to the same degree of protection required for the trees that are required to be preserved.
- Stockpiling of soil or materials in the root protection zone of a regulated tree - The zoning code specifically notes that staging or storage of materials or equipment during construction in the root protection zone is not allowed. However, as noted, it’s not always apparent which trees are subject to root protection zone requirements. Also, Arborists may specify alternate root protection areas for trees and this additional information may not always be forwarded to inspectors who might then erroneously believe that an encroachment violation has occurred. When a root protection zone has been violated, the applicant’s arborist is called in to assess the level of damage to the tree, and recommend corrective measures. If the tree is found to be viable and the soil or materials are moved, then the violation is typically not pursued further.
- Cutting major roots on a neighbor’s tree - If a tree is on a common property line or is in a neighbor’s yard, it is exempt from the City’s preservation requirements for land divisions. However, the root system of these trees may extend well into the project site. Impacts to neighbors trees through crown or root pruning activity is not addressed by the zoning code. These issues are not addressed as code violations but rather as civil matters between property owners².

² **ORS 105.810 Treble damages for injury to or removal of produce, trees or shrubs; costs and attorney fees; limitation on liability of contract logger.** ...whenever any person, without lawful authority, willfully injures or severs from the land of another any produce thereof or cuts down, girdles or otherwise injures or carries off any tree, timber or shrub on the land of another person, or of the state, county, United States or any public corporation, or on

- Digging for a drywell or other utility in the root protection area of a tree that is to be preserved - This situation is specifically prohibited by Title 33. However, conflicts and confusion may arise because at times the drywell is shown on the approved plans within the root protection zone (as described in the Utility/Infrastructure Permit Coordination issue paper). And in some cases, the project arborist may allow these limited encroachments, subject to his or her specific recommendations and supervision.
- Obviously, removing a tree when a review or permit is required is a violation, but as noted in the Code Complexity issue paper, establishing when a permit or review is required is not always straightforward, and can vary based on a property's use, location, underlying zone, and past land use history. Also, in some cases, trees may be removed and their stumps ground leaving no physical evidence behind, making it very difficult to establish whether the tree was in fact a regulated tree.

Based on the complexity inherent in the current set of tree regulations, it is often difficult for staff to advise the public and applicants about universally allowed and prohibited actions. Also, there isn't adequate information on the site for the general public to know when a violation is occurring.

When a suspected violation is reported, City inspection staff will verify with planning staff any time there is any question or uncertainty about the applicable regulations. These issues are complicated and require a high level of discretion to determine the degree of real or potential damage. There are many factors and degrees of damage, and not all tree preservation infractions will result in permanent damage. Enforcement staff works with the project arborist and the City's Urban Forestry arborist to assess these situations and make informed and responsible enforcement decisions.

Enforcement Options

There are three primary means of addressing violations of the tree regulations: civil citations (including the possibility of criminal penalties), plan check processes for limited environmental zone violations, or land use reviews. When an inspection clearly reveals that a tree had been damaged or removed, concluding that it was regulated would be the first task, and then establishing which set of regulations apply would follow. With that information, the proper procedural route to remedy the violation can be determined. While the enforcement staff is very familiar with the various zoning code processes and requirements, the complexity of these rules can frustrate an unknowing violator, neighborhood associations, and the general public who are unfamiliar with the system.

It is an easier circumstance from an enforcement standpoint to address the situation where a tree has been illegally removed. The existing recourse options are monetary penalties (fines), time penalties (delays), and restitution (replanting). The equation becomes more complicated when a tree has been damaged but not removed, and it is not clear that its future viability has been compromised. For example, trenching beside a tree or soil compaction within the critical root zone won't cause the tree to decline immediately. The consequences of inflicted damage may not be apparent until years after the incident. However, unless the tree is removed, there may not be adequate room for planting replacement trees, although equivalent payment into a

the street or highway in front of any person's house, or in any village, town or city lot, or cultivated grounds, or on the common or public grounds of any village, town or city, or on the street or highway in front thereof, in an action by such person, village, town, city, the United States, state, county, or public corporation, against the person committing such trespasses if judgment is given for the plaintiff, it shall be given for treble the amount of damages claimed, or assessed for the trespass.

tree fund or planting off site might be an option. And since the tree is not dead, assessing the same penalty as if the tree *had* been removed might be excessive, and requiring the tree to be preemptively removed would be onerous unless the tree was determined to pose a hazard.

If the tree that was damaged or removed is under the purview of the Parks Bureau, Urban Forestry inspectors will notify the responsible party and reference the Title 20 code requirements and require mitigation and/or payment of a penalty. Pursuing crown reconstruction is usually the response to address street tree pruning violations, whereas requiring a mitigation fee for tree replacement is often the response to address illegal public or private tree removal. Most violations are resolved in a cooperative manner, thus avoiding the need for punitive penalties or legal action.

For trees that are regulated by the zoning code (Title 33) and enforced by BDS, a land use review process is utilized to handle most tree-related violations. Within the environmental overlay zone, some violations may be addressed through a relatively quick process using clear and objective standards. The process to correct a violation is identified in the applicable set of regulations. For example, a tree that was cut but required to be preserved through a land division would go through a Tree Violation review to correct the situation. As indicated in Table 1, there are as many as 15 different land use procedures to address tree situations. The cost for each varies considerably, as does the timeframe to complete the review.

One of the perceptions of this present system is that it is the process itself that becomes the punishment more than the required restoration or payment. The negative impact of such a system is that it is time consuming and delays mitigation. With unwilling applicants, the quality of the applications tends to require greater scrutiny and more correction, and getting responses and additional required information from applicants is hampered. This demands more staff time to get these cases resolved and completed, and in turn staff capacity to deal with other development applications. To date, BDS has not faced a situation where an applicant's proposal could not be approved through the application of numerous conditions of approval. However, if this were to happen, the Hearings Officer would be asked to act on the application, and if denied, the case would likely be referred back to compliance services to pursue fines and potentially place liens on the property.

Penalties

Three types of penalties exist within the Parks Bureau Code (Title 20); civil penalties, civil remedies, and criminal penalties³. The civil penalties process authorizes Urban Forestry to send

³ **20.40.210 Criminal Penalty.** (similar penalties are repeated in 20.42 for non public trees)

Any person, firm or corporation violating any provision of this Chapter shall, upon conviction, be fined a sum not exceeding \$1,000 or shall be imprisoned for a term not exceeding 6 months or shall be punished by both such fine and imprisonment.

20.40.215 Civil Penalties. (similar remedies are provided for in 20.42)

Any person who cuts or removes any tree that is subject to the provisions of this Chapter, or who contracts for, pays for or otherwise allows or suffers such cutting or removal, if such cutting or removal is undertaken without a permit as required by this Chapter or in non-compliance with any term, condition, limitation or requirement of such permit, shall be subject to a [\$1,000] civil penalty...each tree shall constitute a separate violation, and each day that the person fails to obtain a permit or remains in non-compliance with a permit shall also constitute a separate violation.

20.40.220 Civil Remedies. (There is no equivalent provision for private trees in 20.42)

In addition to the remedies provided by any other provision of this Chapter, the City shall have the right to obtain, in any court of competent jurisdiction, a judgment against any person removing or causing damage to any tree in violation of this Chapter. In any such action, the measure of damages shall be the actual replacement value of the damaged or destroyed tree(s).

a letter requesting up to \$1,000 per public or private tree violation, but violators may contest the finding before a hearings officer. In assessing the violation, the hearings officer may consider: the nature and extent of the responsible party's involvement in the violation; the benefits, economic, financial or otherwise, accruing or likely to accrue to the violator as a result of the violation; whether the violation was isolated and temporary, or repeated and continuing; the magnitude and seriousness of the violation; the City's cost of investigation and remedying the violation; or any other applicable facts bearing on the nature and seriousness of the violation. This is the most common type of violation penalty used. The civil remedies process is unique to public tree regulations and provides in addition to the other remedies in Title 20, a judgment against any person illegally removing or causing damage to any tree. In these cases, the restitution is the actual replacement value of the damaged or destroyed tree(s). These cases typically are in egregious situations where the violation was flagrant and the lost tree is exceptional. Finally, criminal penalties are punishable by up to \$1,000 fine and/or six months in prison for illegal removals of either public or private trees, but they require a conviction by the District Attorney. This type of penalty is not generally used, but serves as an additional tool, if so warranted. In addition to the penalties, mitigation replanting is also required.

The zoning code (Title 33) has procedures in place for pursuing other types of code violations through Chapter 3.30 (Establishment of Enforcement Priorities and Remedies), Title 22 (Hearings Officer Procedures), or Section 33.700.040 (Reconsideration of Land Use Reviews). However, for resolving tree related issues, the zoning code and Development Services have instituted land use review and plan check processes. Only when these processes are not successful are additional remedies such as fines or liens necessary. Within the zoning code there is a wide range of fees and procedures represented within the different land use reviews used to address tree issues. The Bureau typically does not institute monetary penalties, but instead treats tree violations as an "alteration" to a site that requires a land use review, unless corrective action can be taken to resolve the situation (for instance replacing or planting a required landscape tree).

This means that two similar trees could have different costs and procedural types associated with their illegal removal. Under today's regulatory system, it can be confusing since a like-zoned, similarly-sized properties may have no requirements for obtaining tree permits, while the tree on the adjacent property is subject to a preservation condition from a prior land use review. It is also possible (though not common) for two trees on the same property to be regulated by different codes, and therefore their illegal removal prosecuted in two separate courses of action⁴.

A proportionate and equitable response is important, for overall public support as well as general belief in the system. Consider for instance these two scenarios:

- 1) A 4-lot land division site (with a portion in a landslide hazard area) contained four trees, two were dead, and the remaining two were mediocre quality 14" diameter shore pines. The developer preserves one of the two viable trees to meet the 35% preservation option. The house has been built and the new owner is creating a landscape plan that includes native trees, shrubs, and groundcovers. The shore pine tree does not fit with the concept. He chats with his next door neighbor (who incidentally is not in the land division site) who says

⁴ For example, such a situation could occur on a commercially zoned parcel with scenic overlay zoning. Removal of the trees outside the scenic overlay are subject to Title 20 and assessment of penalties, otherwise they would be subject to Title 33 and a Tree Review process..

that he called the City to see if he needed a permit to cut a very large Doug fir tree on his lot, and he didn't, so the owner cuts down the shore pine tree that is required to be preserved.

Since the land division site was reviewed through a Type III review process and the size of the tree cut was greater than 12", the owner will need to apply for a Pre-Application Conference (\$2,791), and a Type III Tree Violation Review (\$4,644), prepare an application that addresses the approval criteria, draw up plans, attend a hearing before the Hearings Officer, and plant 5 trees. The whole process will take between 12 and 16 weeks, during which the owner will likely not want to move forward with his landscaping plans until a final decision has been rendered on his mitigation plan.

- 2) An 8-lot land division site is being cleared for the new houses. The grading excavator knocks over the protection fencing and removes a stand of 12 large Douglas firs that comprised the tree preservation tract. In this case, the land division application was reviewed as a Type IIx (since it was not within a landslide hazard area). As a result, the responsible party will be required to apply for a Type II Tree Violation Review (\$1,908), revise his previous application and plans that addressed the approval criteria. There is no public hearing. In the end, the applicant will preserve 12 alternate trees on site and will not need to replant. This process will take between 8 and 10 weeks, during which other construction on the project can continue unabated.

Note that in these two scenarios, the violation process is a function of the procedure the initial land use review went through and in the case of the Type III Land Division review, the size or cumulative size of the tree(s) cut. However, there is no distinction between removing small, medium, or large canopy trees, or even between non-native and significant trees.

These hypothetical situations illustrate the potential for disparity between penalties, and that penalties are often unrelated to the degree of the violation and the value of the lost tree resource.

Conclusion

Enforcement, while a critical component in the success of any regulatory system, is challenging. There is no way to ensure that applicants, contractors, and owners will continually abide by the City's rules. Part of this is due to the public not knowing what the rules are, or not knowing how to follow them. This aspect of the problem could be addressed through improved public education and outreach. Part the problem is due to the complicated nature of the current codes. This can be addressed, at least in part, by making the codes consistent and more understandable.

Enforcement programs should include criteria and provisions to help prioritize appropriate timeliness, degrees of response, and imposition of penalties.. While adherence to regulations is paramount, discretion is also a hallmark of a responsible enforcement program.

Enforcement is still largely dependent on an active reporting program (i.e. an informed and involved citizenry) and also relies on having sufficient funding and staff resources to respond to those complaints.

In addition to the complicated current rules, the reliance on land use reviews as an enforcement process tends to further hamper speedy resolution and the options to rectify tree violations are limited.

TABLE 1. SUMMARY OF LAND USE REVIEW TYPES TO ADDRESS TREE VIOLATIONS.

Type of Review (Typical Timeframe⁵)	Applies to:	Cost of Review⁶
Tree Review – Type II (8-10 week review)	Trees (6” dbh and larger) in the scenic corridor overlay zone “s” that are not in “c” or “p” zone (33.480.050) Trees (6” and larger at 5’ above ground) in the Rocky Butte Plan District that are not in “c” or “p” zone (33.570.040) Violations to other tree preservation requirements of “this Title” – notably, the Johnson Creek PD, South Auditorium PD, Historic Landmark Trees, but <u>not</u> EN or GW zones	\$972
Tree Preservation Violation Review – Type II (8-10 week review)	<u>Violations</u> to tree protection and preservation requirements of Land Division reviews outside of EN zones.	\$1,908
Tree Preservation Violation Review – Type III (15 week review)	<u>Violations</u> to tree protection and preservation requirements of Type III Land Division reviews when more than 12” have been removed outside of EN zones.	\$4,644
EN Zone Violation-Option 1 Plan Check (2 weeks) minimum	Illegal removal of up to 12” of trees in the “c” or “p” resource area (with additional restrictions for smaller significant trees)	\$557 + zoning permit fee ⁷
EN Zone Violation-Option 2 Plan Check (2 weeks) minimum	Illegal removal of more than 12” of trees in the “c” or “p” resource area (with additional restrictions for smaller significant trees)	\$557 + zoning permit fee
EN Zone Violation-Option 3 Type II (8-10 week review) Type III (15 week review)	When the standards of Options 1 or 2 cannot be met, violations to tree regulations in the “c” or “p” resource area must go through an environmental review process	\$2,364 type II \$7,842 type III
EN Zone Violation- developed SFR undividable lot Option 3 - Type III (15 week review)	When the standards of Options 1 or 2 cannot be met, and the site is occupied by an SFR and is not large enough to divide, and a Type III EN review would be required per 33.430.230.	\$3,859
EN Zone Violation- Columbia South Shore Plan District - Type II (8-10 week review)	Removal of non-nuisance non-hazard trees (any size) in the “c” or “p” zones, including transition areas, within CSSPD.	\$3,427

⁵ Timelines are typical, based on complete application submittal. For land use reviews, an applicant has 6 months to make their application complete. For zoning permits, there is no time limit, however, code enforcement staff will typically identify timeframes to correct the violation, before penalties are levied.

⁶ Fees are as of September 10, 2008, and subject to change. The fees do not reflect any other additional mitigation costs that may be imposed such as payment into the Tree Fund or costs of purchasing and planting required mitigation materials.

⁷ The zoning permit fee is based on the value of the work to be performed, but is typically in the \$175-\$300 range.

EN Zone Violation- CSSPD w/ developed SFR undividable lot - Type II (8-10 week review)	Removal of non-nuisance non-hazard trees (any size) in the “c” or “p” zones, including transition areas within CSSPD on a site occupied by an SFR and is not large enough to divide.	\$1,360
Pleasant Valley Violation Process-Option 1 (2 weeks)	Illegal removal of up to 12” of trees listed in the <i>Portland Plant List</i> in the Pleasant Valley Natural Resources “v” overlay (with additional restrictions for smaller significant trees)	\$557 + zoning permit fee
Pleasant Valley Violation Process-Option 2 (2 weeks)	Illegal removal of more than 12” of trees listed in the <i>Portland Plant List</i> in the Pleasant Valley Natural Resources “v” overlay (with additional restrictions for smaller significant trees)	\$557 + zoning permit fee
Pleasant Valley Violation Process-Option 3 Type II (8-10 week review) Type III (15 week review)	When the standards of Options 1 or 2 cannot be met, violations to tree regulations in the “v” overlay area must go through a Land Use review process	\$1,879 type II \$6,521 type III
Greenway Review Residential - Type II (8-10 week review)	Although the Tree Review chapter (33.853) specifically excludes greenway zone violations, there is no specific procedure assigned to address violations within the greenway zone. Instead, a retroactive greenway review is required. - Non-nuisance non-hazard trees (any size) in greenway overlay zones “n” “r” “g” “i” “q”	\$1,587
Greenway Review Non-residential - Type II (8-10 week review)	Non-nuisance non-hazard trees (any size) in greenway overlay zones “n” “r” “g” “i” “q”	\$4,378
Adjustment – Type II (8-10 week review)	When tree removal standards cannot be met, i.e. Johnson Creek, or Land Division preservation standards.	\$680 SFR, \$836 non SFR \$1,177 non residential
Amending Conditions of Approval	Violations to Trees that are required to be preserved by a specific condition of approval that are not part of a Land Division.	Fee based on type of initial land use review.

Appendix K

Fiscal Impact Analysis Detail

Fiscal Impact Summary

Fiscal Impact Tables and Budget Summaries

Citywide Tree Project Land Use Review Costs

Summary of Changes to Draft Proposal per PC/UFC direction:

- Remove criterion for AD, CU, DZ cases
- List tree preservation along with other factors in CU and DZ cases
- Remove code requirement for preliminary tree assessment for Type III LD cases
- Scale back level of UF review from all LU cases with tree requirements to “as needed” consultation

Summary of Changes to Staffing Needs (based on changes noted above):

- Remove costs associated with AD cases (no requirement)
- Remove costs associated with CU and DZ cases. It is acknowledged that there may be some additional staff time to address trees in these reviews, however it is expected to be negligible. These changes can be supported with current service levels.
- Remove costs associated with additional TR reviews. The # of reviews are not longer expected to increase because specific tree plans will not be required for additional reviews.
- Remove costs associated with early tree assessment
- Reduce # of counter/phone questions and time spent on EA/pre-application appointments based on reduced scope of proposal.
- Reduce total amount of UF tree expert consultation time for LU cases.

Revised Fiscal Impact Summary Based on average 2000-2008 case volumes*

Function	November 2010 Estimates (Add'l FTE)	April 2010 Estimates (Add'l FTE)
Early Assistance (phone/counter, appts, pre-app). Expected to be primarily regarding LD requirements	0.05	0.25
Review		
CU, DZ	Current service level	0.15
LD (BDS Planner), ~ 206 cases impacted	0.35	0.35
Tree Expert Consultation for LU cases ~104 cases @ 4 hrs per case (~35% of total volume expected to have tree preservation concerns)	0.20	0.7
Total add'l staffing	0.6 FTE	1.45 FTE
Cost per land use case		
Land Division (includes EA and Review avg across 242 cases)	\$289 per case (\$223 BDS (\$54,000/242) + \$66 UF)	
Other: CU, TR, EN, GW (includes UF cost for consultation avg across 357 cases, incl LD cases)	\$66 per case (UF: \$23,700/357)	

* Initial staffing needs are expected to be lower based on lower case volumes.

How this staffing is indicated in the proposed budget table:

Tree Expert Consultation 0.2 – Translates into 0.2 Tree Inspector (Land Use Reviews)

NOTE: this position is combined with 0.3 Tree Inspector (CIP/PW) to make 0.5 position.

Early Assistance .05 + BDS Planner .35 – Is rounded up and reflected as 0.5 City Planner II (Land Use Reviews).

Citywide Tree Project - Building Permit Review Costs

Summary of Changes to Draft Proposal per PC/UFC direction:

- Simplify Preservation with Mitigation –
 - Exempt lots <3,000 s.f.
 - Exempt lots >90% building coverage
 - Apply 35% threshold to trees 12” and larger (from 50% of 20” and larger)
 - Pay out if standards not met.
 - Exempt lots that qualify for homeowner tree permit (e.g. most RS additions)
 Note: The PC/UFC did not specifically direct this change, however, by instituting the homeowner provision in non development situations, a large loophole would be created around the preservation standard for RS additions. We proposed this change to re-align the development and non development requirements.
- Remove inspection requirements from code, rely initially on 10% spot checking
- Remove Optional Tree Review
- Simplify Tree Density requirements for greater ease in implementation

Summary of Changes to Staffing Needs (based on changes noted above):

- Reduced time to review simplified preservation standard/
- Eliminate inspections at preliminary, in process, and at final, substitute with 10% spot check of all cases with tree requirements (preserve or plant)
- Reduced frequency of cases where preservation would occur (reduces protection review and preservation review time)
- Spot check inspection time (1 hour) reflects independent inspection (not piggybacked to other inspections)
- Added some additional staffing to respond to complaints
- Added some additional staffing to coordinate spot check program

Revised Fiscal Impact Summary Based on average 2004-2008 permit volumes*

Function	November 2010 Estimates (Add'l FTE)	April 2010 Estimates (Add'l FTE)
Communication (phone/counter).	0.1	0.1
Plan Review**	0.94	1.7
Inspections 10% of ~5000 permits***	0.65	4.2
Complaint Response	0.37	(Included with inspection time)
Total add'l staffing	2.4 FTE (s,b,oh = \$262,791)	6 FTE (s,b, oh = \$813,500)
Cost per permit (across 5530 permits)***	\$47	\$147

* Initial staffing needs are expected to be lower based on lower case volumes.

** Plan Review functions consist of the following tasks: Tree preservation, protection, and density review and writing checksheets. Of the 5,535 permits subject to either tree preservation and/or tree density review fee, 5,000 will require a check (the other ~500 will not have trees to protect or preserve)

***Inspection is based on: 10% spot check inspection of permits with tree requirements. Portion of time spent to evaluate RPZ arborist reports.

How this staffing is indicated in the proposed budget table:

Plan Review – 1.04 Communication and Plan review translates into 1.0 City Planner II

Inspections/Complaint Response – 1.02 Translates into 1.0 Tree Inspector

Citywide Tree Project - Private Tree Removal Permit Costs

Summary of Changes to Draft Proposal:

Tree Condition	Mitigation	Appeal
Dead, Diseased, Dangerous	1:1	Applicant only
Nuisance Species		
Within 10' of building		
4 trees 12-20"/year		
Homeowner sites $\geq 20"$		
$\geq 20"$	Up to inch for inch	Applicant and Public
≥ 5 trees		

- Simplified regulated tree size threshold
 - Applies to all properties at 12" and greater, except:
 - "Special areas" subject to 6" tree size
 - Homeowner sites subject to 20" tree size
 - Removed 6" oak and madrone provision
- Simplified mitigation requirement
 - 1:1 mitigation for D,D,D,N, trees w/in 10' of buildings, and removal of up to four 12<20 inch trees
 - 1:1 mitigation for homeowner sites
 - Up to inch for inch mitigation for removal of ≥ 20 inch trees or removal of ≥ 5 trees larger than 12"
 - Note: the PC/UFC did not include specific direction to substitute the 3:1 replacement requirement, however, in conferring with the Forester, this change is consistent with the direction to simplify the requirements.
 - Forester retains discretion to reduce mitigation based on specific considerations
- Public appeals for healthy trees ≥ 20 inch trees or removal of ≥ 5 trees

Summary of Changes to Staffing Needs (based on changes noted above):

- Reduced inspection time to address trees impacting foundations with 10' from building.
- Reduced inspection time to address removal of nuisance species trees.
- Reduced inspection time to address removal of up to 4 trees <20 inches
- Reduced review and decision time to address homeowner sites.
- Reduced instances of public appeals (the proposed definition of "homeowner sites" removes ~20,000 lots that are currently subject to 20.42 permits, tree size threshold subject to public appeal raised from 12 to 20").

Revised Fiscal Impact Summary based on projected number of permits*

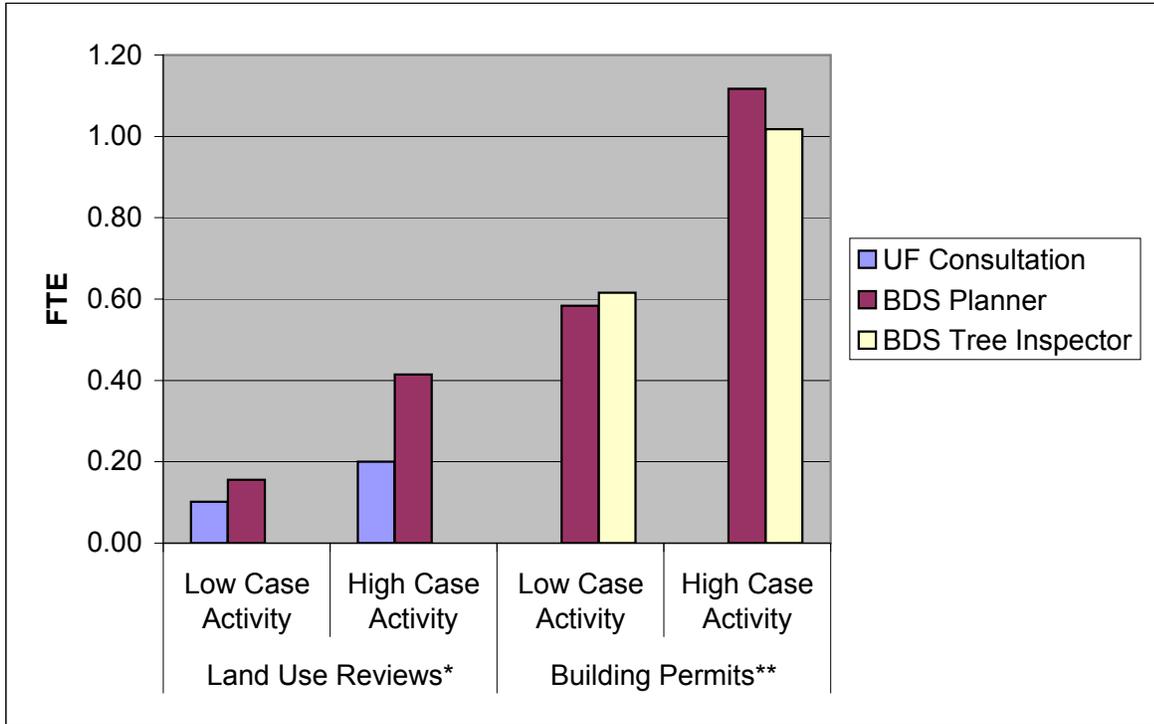
Function	November 2010 Estimates (Add'l FTE)	April 2010 Estimates (Add'l FTE)
Communication	0.07 FTE	0.19 FTE
Permit Review/Inspection/Issuance	0.51 FTE	0.55 FTE
Appeals	0.27 FTE	0.16 FTE
Complaint Response	0.11 FTE	0.42 FTE
Total add'l staffing	0.96 FTE	1.32 FTE

* The estimated number of permits used existing permit activity (120) and projected to account for added lots. These numbers were then doubled (523 total permits) to account for greater awareness of permit system based on universal application of the requirements and reflect an anticipated higher end of activity.

How this staffing is indicated in the proposed budget table:

Communication – is combined with Single Point of Contact duties.

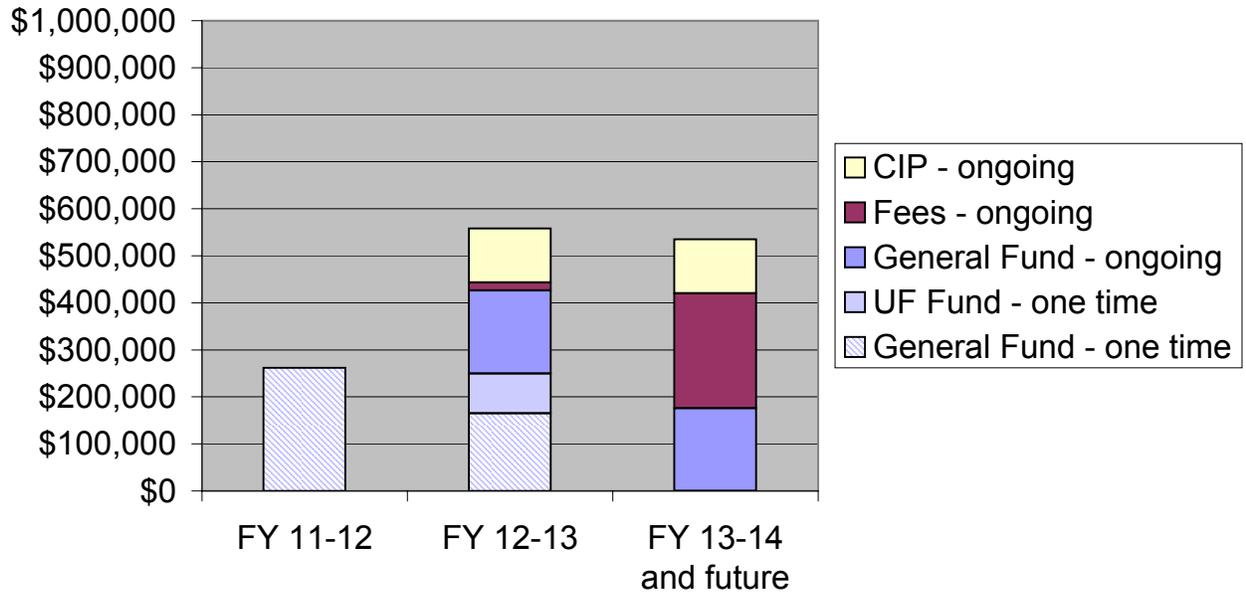
Permit review/inspection/appeals/complaints - .89 is rounded up to 1.0 Tree Inspector



* Building Permit low end case activity is based on average of FY 09-10 permits, hi end activity is based on FY 04-09 permits. Uniformly applied fees range from \$50-60.

** Land Use Review low end case activity is based on average of calendar years 09-10 cases, hi end is based on average of calendar years 00-08. Uniformly applied fees (across all LURs) range from \$60-70. If applied only to Land Divisions, would range from \$300-\$420.

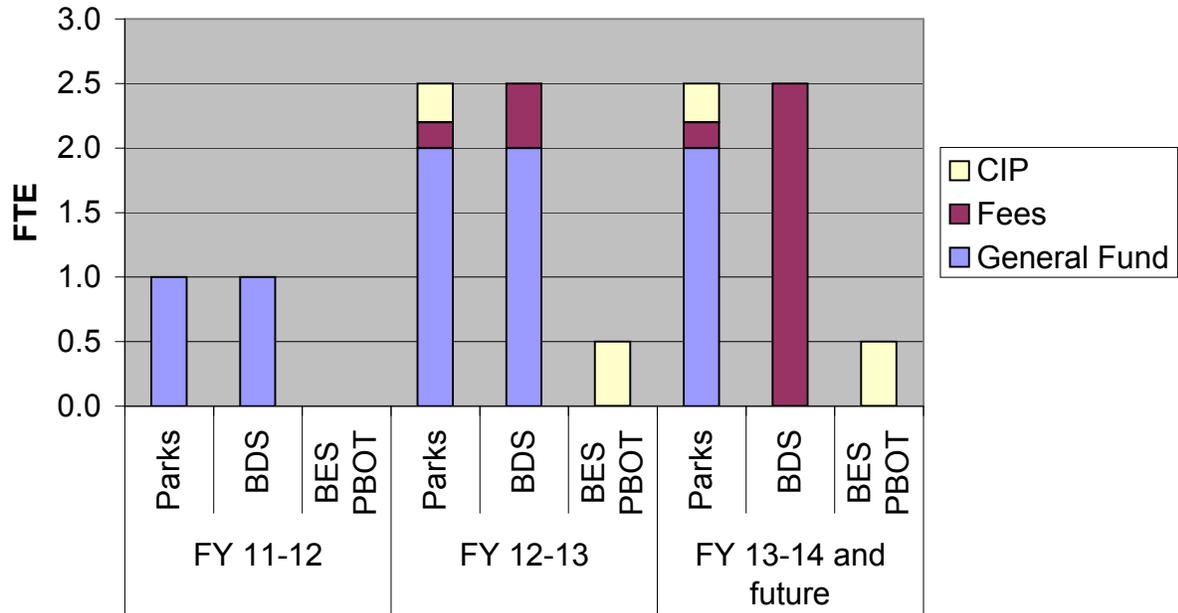
Summary of Tree Project Funding 11/15/10



Summary of Tree Project Funding - 11/15/10

FY period	Bureau	One Time		Ongoing			TOTAL by year
		General Fund	UF Fund	General Fund	Fees	CIP	
FY 11-12		\$262,000	\$0	\$0	\$0	\$0	
	Parks	\$168,000					
	BDS	\$94,000					\$262,000
FY 12-13		\$165,000	\$85,000	\$176,000	\$17,000	\$115,000	
	Parks	\$30,000		\$176,000	\$17,000	\$25,000	
	BDS	\$125,000	\$85,000	\$0	CSL	\$0	\$558,000
	BES	\$10,000				\$21,000	
	PBOT					\$17,000	
	Water					\$52,000	
FY 13-14 and future		\$0	\$0	\$176,000	\$244,000	\$115,000	
	Parks			\$176,000	\$17,000	\$25,000	
	BDS				\$227,000	\$0	\$535,000
	BES					\$21,000	
	PBOT					\$17,000	
	Water					\$52,000	

Citywide Tree Project Additional Staffing and Funding Source



Summary of Tree Project Staffing - 11/30/10

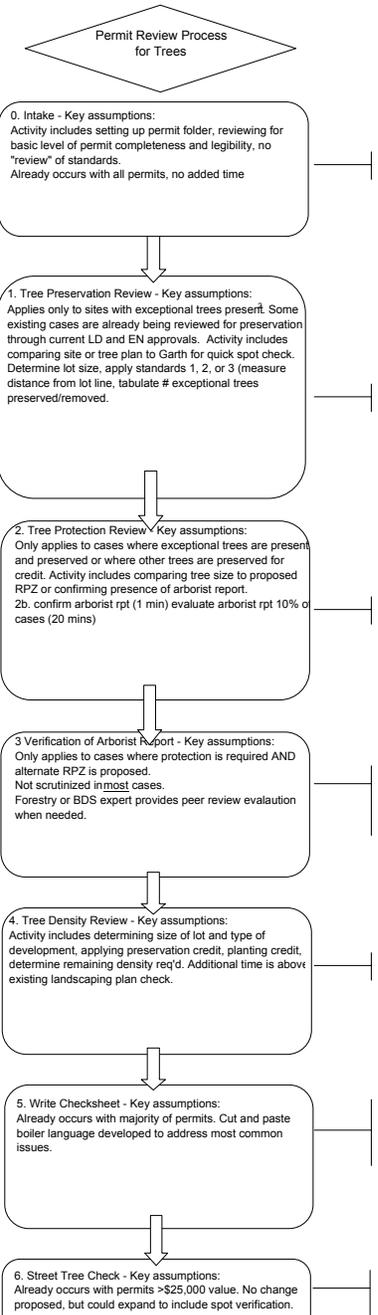
FY period	Bureau	General Fund	Fees	CIP
FY 11-12	Parks	1.0		
	BDS	1.0		
FY 12-13	Parks	2.0	0.2	0.3
	BDS	2.0	0.5	
	BES PBOT			0.5
FY 13-14 and future	Parks	2.0	0.2	0.3
	BDS		2.5	
	BES PBOT			
	Water			0.5
	Water			0.5

Building Permits (RS, CO, MG, SD, and ZP) FY 04-09 Average **BPS DRAFT 11/1/2010**

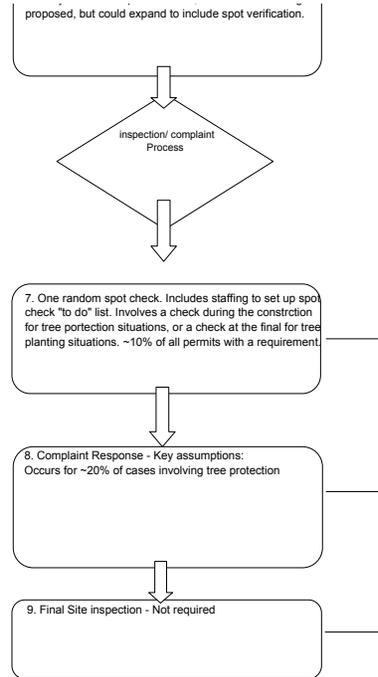
Density plus Preservation

Changes from May 24, 2010

Tasks	Current	Activity	Add'l hours per case	% of cases	# of Cases	Total add'l time
1 Communications	Ongoing outreach to public and applicants	INCLUDED W/START UP COSTS Add list of "qualified tree professionals" to include in outreach	0.0		0	0.0
	a. Update: - handouts, examples and brochures periodically	INCLUDED W/START UP COSTS - plan submittal requirements to include tree information. - handouts to include new tree preservation, protection, planting req's - sample Final Tree Plan.	0.0		0	0.0
	b. Events - brownbags, remodeling shows	INCLUDED WITH START UP COSTS: - tree specific brownbags to outreach events (building permit, land use, tree protection, planting and care)	1.0		12	0.0
	c. Counter question/answer	Add: time to discuss tree regs	0.2		1040	208.0
TOTAL		Total communications time				208.0
2 Intake and Review		task 0 applies to all permits (no added time)	0.0		10436	0.0
a. Residential (RS) Cases				% of cases	impacted cases	add'l time
1929 (New) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 (some existing cases already reviewed for trees through current LD)		0.3	43%	829	248.8
	task 2 - Protection Review		0.1	30%	579	48.2
	task 3 - Arborist Report Review		0.3	10%	193	64.3
	task 4 - Tree Density Review		0.2	100%	1929	385.8
	task 5 - Add Trees to Checklist (75% of task 4 cases)		0.2	75%	1447	241.1
1485 (Add'n) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 (most RS additions will be on sites exempt from preservation)		0.2	10%	149	29.7
	task 2 - Protection Review		0.1	5%	74	7.4
	task 3 - Arborist Report Review		0.3	0%	0	0.0
	task 4 - Tree Density Review		0.2	75%	1114	222.8
	task 5 - Add Trees to Checklist (100% of task 1 cases)		0.2	5%	74	12.4
478 (Demo) - identify applicable regs, prior land use approvals etc, verify presence of site plan	task 1 (fewer cases where exceptional trees present than vacant sites)		0.2	65%	311	62.1
	task 2 - Protection Review		0.1	30%	143	12.0
	task 3 - Arborist Report Review		0.3	10%	48	15.9
	task 4 - Tree Density Review		0.2	0%	0	0.0
	task 5 - Add Trees to Checklist (75% of task 1 cases)		0.2	49%	234	39.0
2119 (Alt) - identify applicable regs, prior land use approvals etc, verify presence of site/floor plan and elevations	No change (preservation and planting do not apply)		0.0	0%	0	0.0
13 (Move) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	No change (preservation and planting do not apply)		0.0	0%	0	0.0
65 (Fire Repair) - confirm Fire Damage folder, no further action.	No change (preservation and planting do not apply)		0.0	0%	0	0.0
RS SUBTOTAL	RS where no tree plan review occurs = 2,197	Number of RS permits with added tasks/total added time			3353	1389.6
6089						
b. Commercial (CO) Cases				% of cases	impacted cases	add'l time
816 (New) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 - Preservation Review		0.3	65%	530	159.1
	task 2 - Protection Review		0.1	25%	204	17.0
	task 3 - Arborist Report Review		0.3	10%	82	27.2
	task 4 - Tree Density Review		0.3	100%	816	244.8
	task 5 - Add Trees to Checklist		0.2	25%	204	34.0
265 (Add'n) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 - Preservation Review		0.2	40%	106	21.2
	task 2 - Protection Review		0.1	25%	66	5.5
	task 3 - Arborist Report Review		0.3	10%	27	8.8
	task 4 - Tree Density Review		0.3	100%	265	79.5
	task 5 - Add Trees to Checklist		0.2	75%	199	33.1
109 (Demo) - identify applicable regs, prior land use approvals etc, verify presence of site plan	task 1 - Preservation Review		0.2	65%	71	14.2
	task 2 - Protection Review		0.1	25%	27	2.3
	task 3 - Arborist Report Review		0.3	10%	11	3.8
	task 4 - Tree Density Review		0.3	0%	0	0.0
	task 5 - Add Trees to Checklist (75% of task 1 cases)		0.2	49%	53	8.9
1766 (Alt) - identify applicable regs, prior land use approvals etc, verify presence of site/floor plan and elevations	task 1 - Preservation Review		0.2	0%	0	0.0
	task 2 - Protection Review		0.1	0%	0	0.0
	task 3 - Arborist Report Review		0.3	0%	0	0.0
	task 4 - Tree Density Review (all NCU's)		0.3	12%	212	63.6
	task 5 - Add Trees to Checklist		0.2	12%	212	35.3
1 (Move) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	No change (preservation and planting do not apply)		0.0	0%	0	0.0
31 (Fire Repair) - confirm Fire Damage folder, no further action.	No change (preservation and planting do not apply)		0.0	0%	0	0.0
CO SUBTOTAL	CO where no tree plan review occurs	Number of CO permits with added tasks/total added time			1364	758.2
2988						
c. Major Projects (MG) Cases				% of cases	impacted cases	add'l time
50 (New) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 - Preservation Review		0.2	65%	33	6.5
	task 2 - Protection Review		0.1	30%	15	1.3
	task 3 - Arborist Report Review		0.3	10%	5	1.7
	task 4 - Tree Density Review		0.1	100%	50	4.2
	task 5 - Add Trees to Checklist		0.2	5%	3	0.4
1 (Add'n) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 - Preservation Review		0.2	40%	0	0.0
	task 2 - Protection Review		0.1	30%	0	0.0



		task 3 - Arborist Report Review	0.3	10%	0	0.0	
		task 4 - Tree Density Review	0.2	100%	1	0.2	
		task 5 - Add Trees to Checksheet	0.2	5%	0	0.0	
0 (Demo) - identify applicable regs, prior land use approvals etc, verify presence of site plan		task 1 - Preservation Review	0.2	40%	0	0.0	time per case 0.4 to 0.2
		task 2 - Protection Review	0.1	25%	0	0.0	
		task 3 - Arborist Report Review	0.3	10%	0	0.0	
		task 4 - Tree Density Review	0.2	0%	0	0.0	
		task 5 - Add Trees to Checksheet	0.2	5%	0	0.0	
4 (Alt) - identify applicable regs, prior land use approvals etc, verify presence of site/floor plan and elevations		task 1 - Preservation Review	0.2	40%	2	0.3	time per case 0.4 to 0.2
		task 2 - Protection Review	0.1	30%	1	0.1	
		task 3 - Arborist Report Review	0.3	10%	0	0.1	
		task 4 - Tree Density Review (assume all-NCU)	0.2	100%	4	0.8	
		task 5 - Add Trees to Checksheet	0.2	5%	0	0.0	
0 (Move) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations		No change (preservation and planting do not apply)	0.0	0%	0	0.0	
0 (Fire Repair) - confirm Fire Damage folder, no further action.		No change (preservation and planting do not apply)	0.0	0%	0	0.0	
MG SUBTOTAL	MG where no tree plan review occurs = 0	Number of MG permits with added tasks/total added time			55	15.7	
d. Other Permits	TOTAL Number of Other Cases - 1,172			% of cases	impacted cases	add'l time	
85 (SD - RS) Site Development, Residential		task 1 - Preservation Review	0.4	43%	37	14.6	
		task 2 - Protection Review	0.1	40%	34	2.8	
		task 3 - Arborist Report Review	0.3	10%	9	2.8	
		task 4 - Tree Density Review	0.1	0%	0	0.0	
		task 5 - Add Trees to Checksheet	0.2	5%	4	0.9	
41 (SD - CO) Site Development, Commercial		task 1 - Preservation Review	0.3	43%	18	5.3	time per case 0.4 to 0.2
		task 2 - Protection Review	0.1	40%	16	1.4	
		task 3 - Arborist Report Review	0.3	10%	4	1.4	
		task 4 - Tree Density Review	0.1	0%	0	0.0	
		task 5 - Add Trees to Checksheet	0.2	5%	2	0.3	
218 (ZP - RS) Zoning Permit, Residential		task 1 - Preservation Review	0.2	65%	142	28.3	time per case 0.4 to 0.3
		task 2 - Protection Review	0.1	40%	87	7.3	
		task 3 - Arborist Report Review	0.3	10%	22	7.3	
		task 4 - Tree Density Review	0.1	0%	0	0.0	
		task 5 - Add Trees to Checksheet	0.2	5%	11	1.8	
31 (ZP - CO) Zoning Permit, Commercial		task 1 - Preservation Review	0.2	40%	12	2.5	time per case 0.4 to 0.2
		task 2 - Protection Review	0.1	30%	9	1.0	
		task 3 - Arborist Report Review	0.3	10%	3	1.0	
		task 4 - Tree Density Review	0.1	0%	0	0.0	
		task 5 - Add Trees to Checksheet	0.2	5%	2	0.3	
23 (MI) Manufactured Dwelling on individual lot		task 1 - Preservation Review	0.3	65%	15	4.5	time per case 0.4 to 0.3
		task 2 - Protection Review	0.1	30%	7	0.8	
		task 3 - Arborist Report Review	0.3	10%	2	0.8	
		task 4 - Tree Density Review	0.1	100%	23	1.9	
		task 5 - Add Trees to Checksheet	0.2	5%	1	0.2	
904 (FA) Facility Permits		No change (preservation and planting do not apply)	0.0	0%	0	0.0	
OTHER SUB 1,172	Other permits where no tree plan review occurs = 904	Number of OTHER permits with added tasks/total added time			231	86.7	
4569	Total number of cases with Tree Density rev fee						
5535	Total number of cases with Tree Density + Pres rev fee	Total Number of Permits with added tasks/total added time			5004	2250.1	
4	Field Confirmation City arborist conducts site visit to evaluate arborist reports Spot Check No current program to spot check	50% sum of Task 3 a. Create Program b. Track new permits c. 10% Sample (all impacted permits) d. Site Verification (ranges from drive-by to measuring trees)	1.0 1.0		203 500	202.5 500.4	
	Add for spot checking program set up	Administration for spot checks (determine sample pool and arrange for inspections)=0.25 FTE				520.0	
5	Initial Inspections	Delete inspection program	0.3		0	0.0	
6	Complaints	a. research complaint, site visit, follow-up site visits	3.0		253	758.5	0.65
7	Interim Inspections	Delete inspection program	0.5		0	0.0	0.36
8	Final Inspection	Delete inspection program	0.3		0	0.0	



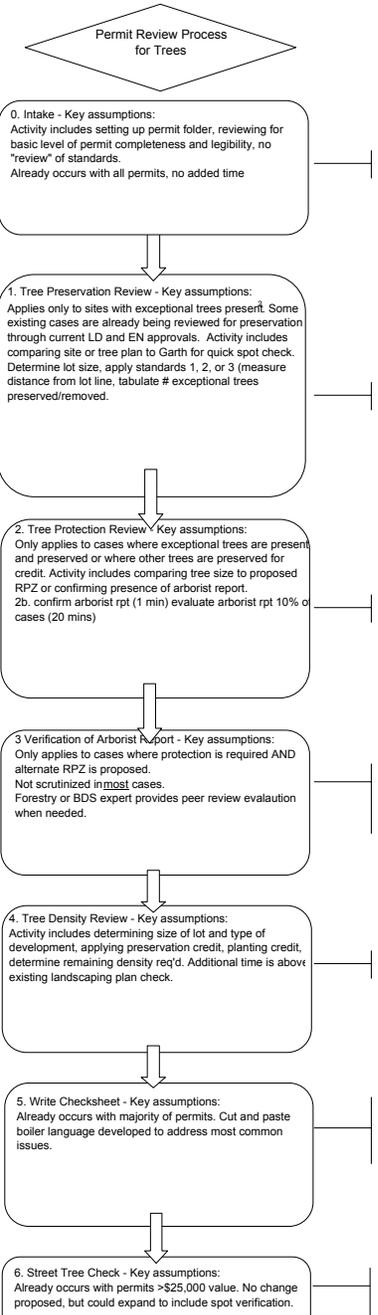
Results based on averaged FY 04-09		
TOTAL TIME	2116.3	2323
TOTAL FTE	1.02	1.12
Annual Cost:salary plus benefits Tree Insp=60,570 + 40%; CPII = 67,642 +	\$86,280	\$105,769
Fully loaded (OH) BDS = 42.28%	\$122,758	\$150,488
Cost per permit where requirements apply (fully loaded)		\$49.37

updated salary to FY10-11 \$'s and classification

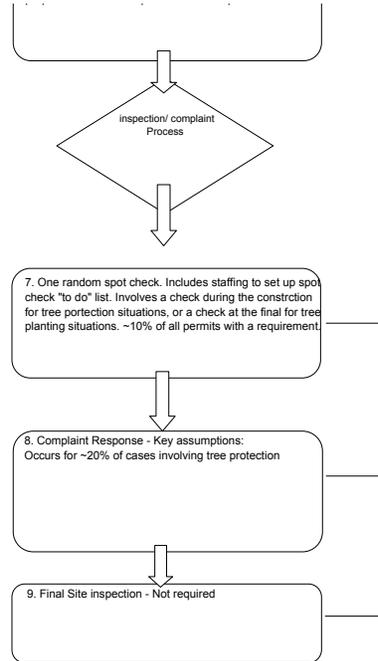
Changed FTE split between UF/BDS to split between Tree Inspection services and planner review services

	cases	time
Sum of Task 1	2254	597.3
Sum of Task 2	1264	106.6
Sum of Task 3	405	135.0
Sum of Task 4	4414	1003.5
Sum of Task 5	2446	407.8

Tasks	Current	Activity	Add'l hours per case	% of cases	# of Cases	Total add'l time
1 Communications	Ongoing outreach to public and applicants	INCLUDED W/START UP COSTS Add list of "qualified tree professionals" to include in outreach	0.0		0	0.0
	a. Update: - handouts, examples and brochures periodically	INCLUDED W/START UP COSTS - plan submittal requirements to include tree information. - handouts to include new tree preservation, protection, planting req's - sample Final Tree Plan.	0.0		0	0.0
	b. Events - brownbags, remodeling shows	INCLUDED WITH START UP COSTS: - tree specific brownbags to outreach events (building permit, land use, tree protection, planting and care)	1.0		12	0.0
	c. Counter question/answer	Add: - time to discuss tree regs	0.2		1040	208.0
TOTAL		Total communications time				208.0
2 In-take and Review		task 0 applies to all permits (no added time)	0.0		10435	0.0
a. Residential (RS) Cases				% of cases	impacted cases	add'l time
864 (New) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 (some existing cases already reviewed for trees through current LD)		0.3	43%	372	111.5
	task 2 - Protection Review		0.1	30%	259	21.6
	task 3 - Arborist Report Review		0.3	10%	86	28.8
	task 4 - Tree Density Review		0.2	100%	864	172.8
	task 5 - Add Trees to Checksheet (75% of task 4 cases)		0.2	75%	648	108.0
728 (Add'n) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 (most RS additions will be on sites exempt from preservation)		0.2	10%	73	14.6
	task 2 - Protection Review		0.1	5%	36	3.6
	task 3 - Arborist Report Review		0.3	0%	0	0.0
	task 4 - Tree Density Review		0.2	75%	546	109.2
	task 5 - Add Trees to Checksheet (100% of task 1 cases)		0.2	5%	36	6.1
247 (Demo) - identify applicable regs, prior land use approvals etc, verify presence of site plan	task 1 (fewer cases where exceptional trees present than vacant sites)		0.2	65%	161	32.1
	task 2 - Protection Review		0.1	30%	74	6.2
	task 3 - Arborist Report Review		0.3	10%	25	8.2
	task 4 - Tree Density Review		0.2	0%	0	0.0
	task 5 - Add Trees to Checksheet (75% of task 1 cases)		0.2	49%	121	20.2
1967 (Alt) - identify applicable regs, prior land use approvals etc, verify presence of site/floor plan and elevations	No change (preservation and planting do not apply)		0.0	0%	0	0.0
13 (Move) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	No change (preservation and planting do not apply)		0.0	0%	0	0.0
48 (Fire Repair) - confirm Fire Damage folder, no further action.	No change (preservation and planting do not apply)		0.0	0%	0	0.0
RS SUBTOTAL	RS where no tree plan review occurs	Number of RS permits with added tasks/total added time			1571	642.8
3867	2028					
b. Commercial (CO) Cases				% of cases	impacted cases	add'l time
315 (New) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 - Preservation Review		0.3	65%	205	61.4
	task 2 - Protection Review		0.1	25%	79	6.6
	task 3 - Arborist Report Review		0.3	10%	32	10.5
	task 4 - Tree Density Review		0.3	100%	315	94.5
	task 5 - Add Trees to Checksheet		0.2	25%	79	13.1
149 (Add'n) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 - Preservation Review		0.2	40%	60	11.9
	task 2 - Protection Review		0.1	25%	37	3.1
	task 3 - Arborist Report Review		0.3	10%	15	5.0
	task 4 - Tree Density Review		0.3	100%	149	44.7
	task 5 - Add Trees to Checksheet		0.2	75%	112	18.6
69 (Demo) - identify applicable regs, prior land use approvals etc, verify presence of site plan	task 1 - Preservation Review		0.2	65%	45	9.0
	task 2 - Protection Review		0.1	25%	17	1.4
	task 3 - Arborist Report Review		0.3	10%	7	2.3
	task 4 - Tree Density Review		0.3	0%	0	0.0
	task 5 - Add Trees to Checksheet (75% of task 1 cases)		0.2	49%	34	5.6
1402 (Alt) - identify applicable regs, prior land use approvals etc, verify presence of site/floor plan and elevations	task 1 - Preservation Review		0.2	0%	0	0.0
	task 2 - Protection Review		0.1	0%	0	0.0
	task 3 - Arborist Report Review		0.3	0%	0	0.0
	task 4 - Tree Density Review (all NCU's)		0.3	12%	168	50.5
	task 5 - Add Trees to Checksheet		0.2	12%	168	28.0
0 (Move) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	No change (preservation and planting do not apply)		0.0	0%	0	0.0
21 (Fire Repair) - confirm Fire Damage folder, no further action.	No change (preservation and planting do not apply)		0.0	0%	0	0.0
CO SUBTOTAL	CO where no tree plan review occurs	Number of CO permits with added tasks/total added time			677	366.3
1956	21					
c. Major Projects (MG) Cases				% of cases	impacted cases	add'l time
34 (New) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 - Preservation Review		0.2	65%	22	4.4
	task 2 - Protection Review		0.1	30%	10	0.9
	task 3 - Arborist Report Review		0.3	10%	3	1.1
	task 4 - Tree Density Review		0.1	100%	34	2.8
	task 5 - Add Trees to Checksheet		0.2	5%	2	0.3
8 (Add'n) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	task 1 - Preservation Review		0.2	40%	3	0.6
	task 2 - Protection Review		0.1	30%	2	0.2
	task 3 - Arborist Report Review		0.3	10%	1	0.3



	task 4 - Tree Density Review	0.2	100%	8	1.3	
	task 5 - Add Trees to Checksheet	0.2	5%	0	0.1	
0 (Demo) - identify applicable regs, prior land use approvals etc, verify presence of site plan	task 1 - Preservation Review	0.2	40%	0	0.0	time per case 0.4 to 0.2
	task 2 - Protection Review	0.1	25%	0	0.0	
	task 3 - Arborist Report Review	0.3	10%	0	0.0	
	task 4 - Tree Density Review	0.2	0%	0	0.0	
	task 5 - Add Trees to Checksheet	0.2	5%	0	0.0	
0 (Alt) - identify applicable regs, prior land use approvals etc, verify presence of site/floor plan and elevations	task 1 - Preservation Review	0.2	40%	0	0.0	time per case 0.4 to 0.2
	task 2 - Protection Review	0.1	30%	0	0.0	
	task 3 - Arborist Report Review	0.3	10%	0	0.0	
	task 4 - Tree Density Review (assume all>NCU)	0.2	100%	0	0.0	
	task 5 - Add Trees to Checksheet	0.2	5%	0	0.0	
0 (Move) - identify applicable regs, prior land use approvals etc, verify presence of site plan and elevations	No change (preservation and planting do not apply)	0.0	0%	0	0.0	
0 (Fire Repair) - confirm Fire Damage folder, no further action.	No change (preservation and planting do not apply)	0.0	0%	0	0.0	
MG SUBTOTAL	MG where no tree plan review occurs = 42			42	12.0	
d. Other Permits	TOTAL Number of Other Cases - 1,172					
			% of cases	impacted cases	add'l time	
35 (SD - RS) Site Development, Residential	task 1 - Preservation Review	0.4	43%	15	6.0	
	task 2 - Protection Review	0.1	40%	14	1.2	
	task 3 - Arborist Report Review	0.3	10%	4	1.2	
	task 4 - Tree Density Review	0.1	0%	0	0.0	
	task 5 - Add Trees to Checksheet	0.2	5%	2	0.4	
39 (SD - CO) Site Development, Commercial	task 1 - Preservation Review	0.3	43%	17	5.0	time per case 0.4 to 0.2
	task 2 - Protection Review	0.1	40%	16	1.3	
	task 3 - Arborist Report Review	0.3	10%	4	1.2	
	task 4 - Tree Density Review	0.1	0%	0	0.0	
	task 5 - Add Trees to Checksheet	0.2	5%	2	0.3	
104 (ZP - RS) Zoning Permit, Residential	task 1 - Preservation Review	0.2	65%	68	13.3	time per case 0.4 to 0.3
	task 2 - Protection Review	0.1	40%	42	3.5	
	task 3 - Arborist Report Review	0.3	10%	10	3.5	
	task 4 - Tree Density Review	0.1	0%	0	0.0	
	task 5 - Add Trees to Checksheet	0.2	5%	5	0.9	
23 (ZP - CO) Zoning Permit, Commercial	task 1 - Preservation Review	0.2	40%	9	1.8	time per case 0.4 to 0.2
	task 2 - Protection Review	0.1	30%	7	0.8	
	task 3 - Arborist Report Review	0.3	10%	2	0.8	
	task 4 - Tree Density Review	0.1	0%	0	0.0	
	task 5 - Add Trees to Checksheet	0.2	5%	1	0.2	
18 (MI) Manufactured Dwelling on individual lot	task 1 - Preservation Review	0.3	65%	12	3.5	time per case 0.4 to 0.3
	task 2 - Protection Review	0.1	30%	5	0.8	
	task 3 - Arborist Report Review	0.3	10%	2	0.8	
	task 4 - Tree Density Review	0.1	100%	18	1.5	
	task 5 - Add Trees to Checksheet	0.2	5%	1	0.2	
918 (FA) Facility Permits	No change (preservation and planting do not apply)	0.0	0%	0	0.0	
OTHER SUB 1.137	Other permits where no tree plan review occurs = 904			127	47.8	
2116	Total number of cases with Tree Density rev fee					
2633	Total number of cases with Tree Density + Pres rev fee			2416	1068.7	
	Total Number of Permits with added tasks/total added time					
4	Field Confirmation	City arborist conducts site visit to evaluate arborist reports	50% sum of Task 3	95	95.3	
	Spot Check	No current program to spot check	a. Create Program b. Track new permits c. 10% Sample (all impacted permits) d. Site Verification (ranges from drive-by to measuring trees)	242	241.6	
		Add for spot checking program set up	Administration for spot checks (determine sample pool and arrange for inspections)=0.25 FTE		520.0	
5	Initial Inspections	Delete inspection program	DELETE	0	0.0	
6	Complaints	a. research complaint, site visit, follow-up site visits	20% of sites with tree protection (ie 20% of task 2)	120	359.4	0.65
7	Interim Inspections	Delete inspection program	DELETE	0	0.0	0.36
8	Final Inspection	Delete inspection program	DELETE	0	0.0	



Results based on averaged FY 04-09

TOTAL TIME	Tree Insp	CPII	2493.0
TOTAL FTE	1279.8	1213	1.20
Annual Cost:salary plus benefits Tree Insp=60,570 + 40%; CPII = 67,642 +	0.62	0.58	
Fully loaded (OH) BDS = 42.28%	\$52,175	\$55,234	\$107,410
Cost per permit where requirements apply (fully loaded)	\$74,235	\$78,587	\$152,822
			\$58.04

updated salary to FY10-11 \$'s and classification

Changed FTE split between UF/BDS to split between Tree Inspection services and planner review services

	cases	time
Sum of Task 1	1060	275.4
Sum of Task 2	599	50.5
Sum of Task 3	191	63.5
Sum of Task 4	2102	477.3
Sum of Task 5	1211	201.9

Land Use Reviews - updated 2/26/10 to incorporate BDS/UF comments (green text) Revised 4/6/10, updated 11/8/10 to reflect PC/UFC direction (green highlight cells)

Tasks	Current	Proposal	Add'l time per case UF Arborist (hrs)	Add'l time per case BDS (hrs)	# of cases impacted per year	Total add'l time per year UF	Total add'l time per year BDS	Total Add'l Time per year	Assumptions	Notes	
1 Customer Service and Early Assistance											
A Communications											
	Ongoing outreach to public and applicants										
	1. Update: - handouts, examples and brochures periodically	Add at start up: - Update handouts to include new tree related requirements. - Create an example Preliminary Tree Plan.							40 hours to create 4-5 new handout, 20 hours to make minor edits to several handouts Assumes BDS takes lead (80%) with UF acting in review role (20%)	moved to start up cost	
	2. Events - brownbags, remodeling shows	Add: - tree specific brownbags and outreach events (building permit, land use, tree protection, planting and care)							2 events: 1 hour each with 8 hours prep for BDS. 4 hours prep for UF.	moved to start up cost	
	3. Counter and phone question/answer	Add: - Increase in questions at counter							Approx one 15 minute sessions per working day (full year)	11/8 reduced # cases from 1040 to reflect focus on LD cases only (no CU/DZ etc)	
		Subtotal		0.25	260	0	65	65		0.03 FTE	
B Early Assistance Appointments											
	Tree preservation requirements apply primarily to Land Division cases: 1. Check aerial and LU History 2. Discuss tree requirements at meeting 3. Prepare written summary	Add: - Tree requirements apply to more types of LU cases (DZ and select CU cases) - Add'l time spent by planner for non-land division and land division cases.		0	0.5	50	0	25	25	BDS recommends 50 cases to include LD cases.	11/8 Reduced amount of time per case from 1 hour to 30 mins. Reflects focus on LD only cases, which already address tree preservation.
C Pre-Application Appointments											
	Tree preservation requirements apply primarily to Land Division cases: 1. Check aerial and LU History 2. Discuss tree requirements at meeting 3. Prepare written summary	Add: - Tree requirements apply to more types of LU cases - Add'l time spent by planner for non-land division and land division cases.		0	1	25	0	25	25	Assume impacts 40% of CU PC and 5% of DZ PC (based on avg # of Type III cases 2004-2008 + 20% to account for cases not submitted). Added 25 LD cases to account for more involved review	11/8 Deleted non LD cases from mix. Reduced to 25 total.
		Add: Preliminary tree assessment required for Type III cases with tree requirements, includes additional steps of: 1. Site visit by Planner and UF Arborist 2. Written summary by UF Arborist							Tasks include: travel/coordination by UF and BDS (1.0), tree assessment by UF and BDS (1.0), written summary by UF (1.5) Assume impacts 95% of LD PC cases. BDS asked for 3.5 hours - why? Add'l time for tree related criteria is included above for these same cases. 2/2/10. Removed CU & DZ cases (25 LD & PD cases only)	11/8 Deleted preliminary tree assessment	
		Subtotal		0	0	0	0	50	50	0.02 FTE	
2 Land Use Review											
A Land Division & Planned Development											
	1. Completeness review by planner - Planner reviews tree preservation plan and arborist report (and other zoning requirements) for completeness and approvability issues - Planner writes incomplete letter	Add: - Increased complexity of review due to discretionary criteria		0	1	165	0	165	165	LD cases based on 2000-2008 avg (242). Assume 85% of LD cases involve trees (206 cases), assume no significant change for 20% of cases that currently use mitigation option (206-41=165 cases)	11/8 For all UF Arborist time, replaced time per case with a block of time for "as needed" consultation.
	2. Completeness Review by other bureaus - Review for Completeness (RFC) sent to PBOT, BES and BDS Site Dev - Bureaus provide written response regarding completeness and approvability issues	Include Urban Forestry in RFC process (non Type III): a. If no preliminary tree assessment, UF arborist does site visit b. UF arborist reviews tree plan and report and comments on completeness and approvability issues		0	0.25	185	0	46.25	46.25	Assume UF tasks are similar to preliminary tree assessment (small time savings shown because applicant will provide arborist report and proposal at this stage). Cases impacted are 206 cases - 21 Type III cases that will have preliminary assessment = 185 New line to capture these cases.	TRACS process line needed for UF at RFC stage. UF review focuses on priority for preservation, exemptions and adequate tree protection. Increased to UF time to 3.5 hours, per their request
	UF review of Type III cases			0	0.25	21	0	5.25	5.25	BDS suggested 1/2 of cases	
	2. Planner Site Visit	Add: - Planner reviews new discretionary tree preservation criteria for all sites with trees - Planner reviews conceptual tree planting against new criterion/standards - Planner reviews street tree criteria in consultation with UF and City Service Bureaus		0	0.5	103	0	51.5	51.5	LD cases based on 2000-2008 avg (242). Assume 85% of LD cases involve trees (206 cases), assume no significant change for 20% of cases that currently use mitigation option (206-41=165 cases)	
	4. Review of complete application by other City review groups - All review groups provide written comments attached to TRACS - UF site visit to determine street tree requirements - UF provides written comments on requirements for street tree planting and removal/protection of existing street trees	Add: - UF arborist reviews tree preservation plan, building on previous review and comment - More involved review of street tree preservation and planting for a subset of cases - Input on tree planting plan for some cases		0	0.25	206	0	51.5	51.5	Applies to all cases where trees involved, assume 85% of LD cases.	
		Add: - 2nd site visit by UF arborist							UF request to add 2nd site visit to address issues raised during review of arborist report and plans		
		Subtract: - Current site visit by UF arborist (done under step 2)							Subtract time for current site visit to assess street trees - site visit is included in the completeness step (#2) for all of these cases.		
	5. Write Decision/Recommendation - Planner writes tree preservation findings and conditions	Add: More involved tree findings required to address discretionary tree preservation criteria, planting criterion and street tree criteria		0	1.5	165	0	247.5	247.5	LD cases based on 2000-2008 avg (242). Assume 85% of LD cases involve trees (206 cases), assume no significant change for 20% of cases that currently use mitigation option (206-41=165 cases)	
	6. Hearings (for Type III cases or Appeals) - Planner prepares and delivers presentation to Hearings Officer or City Council - Bureau representatives testify as technical expert as needed on controversial issues	Add: - UF arborist serves as City's technical expert on tree issues raised in hearings.		0	1.5	165	0	247.5	247.5	Avg # of Type III LD & PD cases (21) + Type III appeals (4) = 25 Assume 33% involve tree issues at hearing or appeal	Forestry asked for 4 hours, seems high
		Subtotal		0	2	8	0	16	16		

	7. Final Plat Review Planner and other Bureau reviewers check compliance with conditions of approval	No change									BDS asked for additional time for final plats (5 x 242 cases). Not sure why. There shouldn't be increased time at this stage over what currently happens now.	
			0	0	0	0	0	0	0	0		
			Subtotal		0	748	748					0.36 FTE
B. Design (DZ) and Specified Conditional Use (CU) Reviews	General. These reviews currently include the same general process steps outlined in 1-6 above for land divisions. However, there are currently no tree preservation criteria for these reviews.	Proposal includes general tree preservation criteria that will apply to cases where trees, particularly Exceptional Trees, may be impacted.									includes CU and CU MS cases, DZ and DZM cases BDS suggests 60% CU, 5% DZ and 20% AD - Used 40% CU and 5% DZ. A quick review of 2007 CU cases show approx 50% will have ground disturbing activity and are subject to criteria in proposal, reduced by add'l 10% because all proposals won't impact trees.	11/8 Deleted DZ cases per direction from PC UFC to revise "criteria" to factors to be considered as relevant to the review.
	1. Completeness Review	Add: Planner reviews tree preservation plan for completeness and approvability	0	0.66	0	0	0	0	0	0	Based on avg # of cases from 2004-2008 Assume will impact 5% of Design cases and 40% of CU cases = 28 cases	
		Add: Option to request UF arborist to review tree plan: - If no preliminary tree assessment, UF arborist does site visit - UF arborist reviews tree preservation plan and comments on completeness and approvability issues	3.5	0.25	0	0	0	0	0	0	Subtract Type III cases that would have had preliminary assessment at PC stage. Increased UF time to 3.5 hours, per their request	
		UF review of Type III cases	-1	0	0	0	0	0	0	0		
	2. Planner Site Visit		0	0.5	0	0	0	0	0	0		
	3. Review of complete application by BDS Planner	Add: Planner reviews new tree preservation criteria for all sites with exceptional trees	0	0.66	0	0	0	0	0	0	Based on avg # of cases from 2004-2008 Assume will impact 5% of Design cases and 40% of CU cases = 29 cases	
	4. Review of complete application by other City review groups	Add: Option to request UF arborist review of tree preservation plan - UF site visit to determine street tree requirements - UF provides written comments on requirements for street tree planting and removal/protection of existing street trees	0.75	0.25	0	0	0	0	0	0	Based on avg # of cases from 2004-2008 Assume will impact 5% of Design cases and 40% of CU cases	
	5. Write Decision/Recommendation (Planner)	Add: Planner writes new tree preservation findings and conditions	0.25	1.75	0	0	0	0	0	0	Based on avg # of cases from 2004-2008 Assume will impact 5% of Design cases and 40% of CU cases	
	6. Hearings (for Type III cases or Appeals)	Add: UF arborist serves as City's technical expert on tree issues raised in hearings.	2.5	2	0	0	0	0	0	0	Assume 10% of cases may need testimony at Type III or appeal hearing.	
			Subtotal		0	0	0	0	0	0		0.00 FTE (4.0 hrs per case BDS & 4.5 for UF)
C. Tree Review	General. These reviews currently include the same general process steps outlined in 1-6 above for land divisions.	Add: increase in tree review cases									Assume increase in TR cases due to additional tree plans approved. Reduced # of additional TR cases - no longer proposing "optional" TR. Estimate based on % TR/TV cases in relation to # of LD decisions (10/206 = 5%). Add 4 cases (5% of 74 add'l CU,DZ,AD reviews)	11/8 Subtract all 4 cases (tied to CU,DZ,AD reviews - tree plans no longer required)
		Add: UF arborist routinely reviews and comments on Tree Review cases	0	0	14	0	0	0	0	0	Based on avg # of TR and TV cases 2004-2008 (10), plus assumed increase in # of cases received (4)	11/8 For all UF Arborist time, replaced time per case with a block of time for "as needed" consultation.
Adjustments	General	Add criterion to minimize impacts to trees and other natural features outside of e-zones.	2.5	2	0	0	0	0	0	0	20% of AD cases based on 2000-2008 average (224 cases); increased % AD cases impacted per BDS request	11/8 Deleted AD cases, no tree criteria proposed.
	Appeals	Additional appeals may be filed as a result of the proposed criterion.	2.5	6	0	0	0	0	0	0	Currently approx 3% of AD cases are appealed (7 of 217 in 2008). Similar rate for fix LD cases. Assume increase by 3 appeals (10 total) as result of new criterion.	11/8 Deleted AD cases, no tree criteria proposed.
EN/GW		Add time for UF consultation	0		11	0	0	0	0	0	Assume UF consultation on 20% of EN, ENM, EV and GW cases	11/8 For all UF Arborist time, replaced time per case with a block of time for "as needed" consultation.
General coordination/case setup		Add time for UF to address general coordination on LU cases - culling files etc	0		942	0	0	0	0	0	corrected total case load # (subtracted FP cases)	11/8 For all UF Arborist time, replaced time per case with a block of time for "as needed" consultation.
UF Consultation for all LURs	IGA has been cancelled. There is no current LU consultation on BDS tree issues (UF still reviews LD for street tree requirements)	Add time for UF consultation on an "as needed" basis.	4		104	416					Assume UF consultation on about 104 cases @ 4 hours per case.	
			Subtotal		416	0	416					0.20 FTE
			Total Hours		416	863	1279					UF net reduction=1,315 hours
			Total FTE (2080 hours/FTE)		0.20	0.41	0.61					BDS net reduction=574 hours
			Cost (salary+40% benefits)		\$16,960	\$39,291	\$56,251					Total FTE reduction= .82 FTE
			Fully loaded (40%ppr oh, 42.28% bds oh)		\$25,100	\$55,903	\$81,003					

Land Use Reviews - updated 2/26/10 to incorporate BDS/UF comments (green text) Revised 4/6/10, updated 11/8/10 to reflect PC/UFC direction (green highlight cells), updated to use 09-10 cal year blended case data (orange text)

Tasks	Current	Proposal	Add'l time per case UF Arborist (hrs)	Add'l time per case BDS (hrs)	# of cases impacted per year	Total add'l time per year UF	Total add'l time per year BDS	Total Add'l Time per year	Assumptions	Notes
1 Customer Service and Early Assistance										
A Communications										
	Ongoing outreach to public and applicants									
	1. Update: - handouts, examples and brochures periodically	Add at start up: - Update handouts to include new tree related requirements. - Create an example Preliminary Tree Plan.							40 hours to create 4-5 new handout, 20 hours to make minor edits to several handouts Assumes BDS takes lead (80%) with UF acting in review role (20%)	moved to start up cost
	2. Events - brownbags, remodeling shows	Add: - tree specific brownbags and outreach events (building permit, land use, tree protection, planting and care)							2 events: 1 hour each with 8 hours prep for BDS. 4 hours prep for UF.	moved to start up cost
	3. Counter and phone question/answer	Add: - increase in questions at counter							Approx one 15 minute sessions per working day (full year)	11/8 reduced # cases from 1040 to reflect focus on LD cases only (no CU/DZ etc)
				0.25	290	0	65	65		
		Subtotal				0	65	65		0.03 FTE
B Early Assistance										
	Tree preservation requirements apply primarily to Land Division cases: 1. Check aerial and LU History 2. Discuss tree requirements at meeting 3. Prepare written summary	Add: - Tree requirements apply to more types of LU cases (DZ and select CU cases) - Add'l time spent by planner for non-land division and land division cases.							BDS recommends 50 cases to include LD cases.	11/8 Reduced amount of time per case from 1 hour to 30 mins. Reflects focus on LD only cases, which already address tree preservation.
			0	0.8	60	0	25	25		
C Pre-Application										
	Tree preservation requirements apply primarily to Land Division cases: 1. Check aerial and LU History 2. Discuss tree requirements at meeting 3. Prepare written summary	Add: - Tree requirements apply to more types of LU cases - Add'l time spent by planner for non-land division and land division cases.							Assume impacts 40% of CU PC and 5% of DZ PC (based on avg # of Type III cases 2004-2008 + 20% to account for cases not submitted). Added 25 LD cases to account for more involved review	11/8 Deleted non LD cases from mix. Reduced to 25 total.
			0	1	25	0	25	25		
		Add: preliminary tree assessment required for Type III cases with tree requirements, includes additional steps of: 1. Site visit by Planner and UF Arborist 2. Written summary by UF Arborist							Tasks include: travel/coordination by UF and BDS (1.0), tree assessment by UF and BDS (1.0), written summary by UF (1.5) Assume impacts 95% of LD PC cases. BDS asked for 3.5 hours - why? Add'l time for tree related criteria is included above for these same cases. 2/21/0: Removed CU & DZ cases (25 LD & PD cases only)	11/8 Deleted preliminary tree assessment
			0	0	0	0	0	0		
		Subtotal				0	50	50		0.02 FTE
2 Land Use Review										
A Land Division & Planned Development										
	1. Completeness review by planner - Planner reviews tree preservation plan and arborist report (and other zoning requirements) for completeness and approvability issues - Planner writes incomplete letter	Add: - Increased complexity of review due to discretionary criteria							LD cases based on case load average for calendar year 2009-2010 (64). Assume 85% of LD cases involve trees (54 cases), assume no significant change for 20% of cases that currently use mitigation option (54-10=44 cases)	11/8 For all UF Arborist time, replaced time per case with a block of time for "as needed" consultation.
			0	1	44	0	44	44		
	2. Completeness review by other bureaus - Review for Completeness (RFC) sent to PBOT, BES and BDS Site Dev - Bureaus provide written response regarding completeness and approvability issues	Include Urban Forestry in RFC process (non Type III): a. If no preliminary tree assessment, UF arborist does site visit b. UF arborist reviews tree plan and report and comments on completeness and approvability issues							Assume UF tasks are similar to preliminary tree assessment (small time savings shown because applicant will provide arborist report and proposal at this stage). Cases impacted are 94 cases - 6 Type III cases that will have preliminary assessment = 72 New line to capture these cases.	TRACS process line needed for UF at RFC stage. UF review focuses on priority for preservation, exemptions and adequate tree protection. increased to UF time to 3.5 hours, per their request
			0	0.25	60	0	14.5	14.5		
	UF review of Type III cases		0	0.25	6	0	1.5	1.5		
	2. Planner Site Visit		0	0.5	39	0	19.5	19.5	BDS suggested 1/2 of cases	
	3. Review of complete application by BDS Planner - Planner reviews tree preservation plan and arborist report against numeric standards - Planner reviews tree protection - Planner reviews discretionary criteria for mitigation option	Add: - Planner reviews new discretionary tree preservation criteria for all sites with trees - Planner reviews conceptual tree planting against new criterion/standards - Planner reviews street tree criteria in consultation with UF and City Service Bureaus							LD cases based on case load average for calendar year 2009-2010 (64). Assume 85% of LD cases involve trees (54 cases), assume no significant change for 20% of cases that currently use mitigation option (54-10=44 cases)	
			0	1	44	0	44	44		
	4. Review of complete application by other City review groups - All review groups provide written comments attached to TRACS - UF site visit to determine street tree requirements - UF provides written comments on requirements for street tree planting and removal/protection of existing street trees	Add: - UF arborist reviews tree preservation plan, building on previous review and comment - More involved review of street tree preservation and planting for a subset of cases - Input on tree planting plan for some cases							Applies to all cases where trees involved, assume 85% of LD cases.	
			0	0.25	54	0	13.5	13.5		
		Add: - 2nd site visit by UF arborist							UF request to add 2nd site visit to address issues raised during review of arborist report and plans	
			0	0	0	0	0	0		
		Subtract: - Current site visit by UF arborist (done under step 2)							Subtract time for current site visit to assess street trees - site visit is included in the completeness step (#2) for all of these cases.	
			0	0	0	0	0	0		
	5. Write Decision/Recommendation - Planner writes tree preservation findings and conditions	Add: More involved tree findings required to address discretionary tree preservation criteria, planting criterion and street tree criteria							LD cases based on case load average for calendar year 2009-2010 (64). Assume 85% of LD cases involve trees (54 cases), assume no significant change for 20% of cases that currently use mitigation option (54-10=44 cases)	
			0	1.5	44	0	66	66		

	6. Hearings (for Type III cases or Appeals) - Planner prepares and delivers presentation to Hearings Officer or City Council - Bureau representatives testify as technical expert as needed on controversial issues	Add: -UF arborist serves as City's technical expert on tree issues raised in hearings.							Appeal data not available - Used same percentage in previous table (8 of 242 cases 3.3% of total cases are appealed and include tree issues) PRIOR BASIS FOR ASSUMPTION: Avg #	Forestry asked for 4 hours, seems high
	7. Final Plat Review Planner and other Bureau reviewers check compliance with conditions of approval	No change							BDS asked for additional time for final plats (5 x 242 cases). Not sure why. There shouldn't be increased time at this stage over what currently happens now.	
			0	2	3	0	6	0		
			0	0	0	0	0	0		
						0	209	209		0.10 FTE
B. Design (DZ) and specified Conditional Use (CU) Reviews	General: These reviews currently include the same general process steps outlined in 1-6 above for land divisions. However, there are currently no tree preservation criteria for these reviews.	Proposal includes general tree preservation criteria that will apply to cases where trees, particularly Exceptional Trees, may be impacted.							Includes CU and CU MS cases, DZ and DZM cases BDS suggests 60% CU, 5% DZ and 20% AD - Used 40% CU and 5% DZ. A quick review of 2007 CU cases show approx 50% will have ground disturbing activity and are subject to criteria in proposal, reduced by add'l 10% because all proposals won't impact trees.	11/8 deleted DZ cases per direction from PC UFC to revise "criteria" to factors to be considered as relevant to the review.
	1. Completeness Review	Add: Planner reviews tree preservation plan for completeness and approvability							Based on avg # of cases from 2004-2008 Assume will impact 5% of Design cases and 40% of CU cases = 29 cases	
			0	0.66	0	0	0	0		
		Add: Option to request UF arborist to review tree plan: - If no preliminary tree assessment, UF arborist does site visit - UF arborist reviews tree preservation plan and comments on completeness and approvability issues UF review of Type III cases							Subtract Type III cases that would have had preliminary assessment at PC stage. Increase UF time to 3.5 hours, per their request	
			3.5	0.25	0	0	0	0		
	2. Planner Site Visit									
			0	0.5	0	0	0	0		
	3. Review of complete application by BDS Planner	Add: - Planner reviews new tree preservation criteria for all sites with exceptional trees							Based on avg # of cases from 2004-2008 Assume will impact 5% of Design cases and 40% of CU cases = 29 cases	
			0	0.66	0	0	0	0		
	4. Review of complete application by other City review groups - UF site visit to determine street tree requirements - UF provides written comments on requirements for street tree planting and removal/protection of existing street trees	Add: Option to request UF arborist review of tree preservation plan - Written comments would be expanded to include on-site trees							Based on avg # of cases from 2004-2008 Assume will impact 5% of Design cases and 40% of CU cases	
			0.75	0.25	0	0	0	0		
	5. Write Decision/Recommendation (Planner)	Add: - Planner writes new tree preservation findings and conditions							Based on avg # of cases from 2004-2008 Assume will impact 5% of Design cases and 40% of CU cases	
			0.25	1.75	0	0	0	0		
	6. Hearings (for Type III cases or Appeals)	Add: - UF arborist serves as City's technical expert on tree issues raised in hearings.							Assume 10% of cases may need testimony at Type III or appeal hearing.	
			2.5	2	0	0	0	0		
						0	0	0		0.00 FTE
C. Tree Review	General: These reviews currently include the same general process steps outlined in 1-6 above for land divisions.	Add: Increase in tree review cases							Assume increase in TR cases due to additional tree plans approved. Reduced # of additional TR cases - no longer proposing "optional" TR. Estimate based on % TR/TV cases in relation to # of LD decisions (10/206 = 5%). Add 4 cases (5% of 74 add'l CU,DZ,AD reviews)	11/8 Subtotal all 4 cases (led to CU,DZ,AD reviews - tree plans no longer required)
						15	0	0		
		Add: - UF arborist routinely reviews and comments on Tree Review cases							Based on avg # of TR and TV cases 2004-2008 (10), plus assumed increase in # of cases received (4)	11/8 For all UF Arborist time, replaced time per case with a block of time for "as needed" consultation.
			0	0	14	0	0	0		
Adjustments	General	Add criterion to minimize impacts to trees and other natural features outside of e-zones.							20% of AD cases based on 2000-2008 average (224 cases); increased % AD cases impacted per BDS request	11/8 Deleted AD cases, no tree criteria proposed.
			2.5	2	0	0	0	0		
	Appeals	Additional appeals may be filed as a result of the proposed criterion							Currently approx 3% of AD cases are appealed (7 of 217 in 2008). Similar rate for its LD cases. Assume increase by 3 appeals (10 total) as result of new criterion.	11/8 Deleted AD cases, no tree criteria proposed.
			2.5	6	0	0	0	0		
	EN/GW	Add time for UF consultation							Assume UF consultation on 20% of EN, ENM, EV and GW cases	11/8 For all UF Arborist time, replaced time per case with a block of time for "as needed" consultation.
			0		11	0	0	0		
	General coordination/ case setup	Add time for UF to address general coordination on LU cases - culling files etc							corrected total case load # (subtracted FP cases)	11/8 For all UF Arborist time, replaced time per case with a block of time for "as needed" consultation.
			0		642	0	0	0		
	UF Consultation for all LURs	UA has been cancelled. There is no current LU consultation on BDS tree issues (UF still reviews LD for street tree requirements)	Add time for UF consultation on an "as needed" basis.						Assume UF consultation on about 53 cases @ 4 hours per case.	
			4		53			212		
						212	0	212		0.10 FTE
						212	324	536		
						0.10	0.16	0.26		
						8642.873	14751.19	23394.06		
						12791.45	20987.99	33779.45		

Tree Permits Absent Development - Private Property (Based on 12" size threshold, no exemption)												
Tasks	Current 20.42 Tree Cutting	Proposal 11.40 Private Trees	Current			Proposed (low end range)			Proposed (high end)			Notes
			Avg. Time per case (hours)	# of Cases	Total Time (hours)	Avg. Time per case (hours)	# of Cases	Total Time (hours)	Avg. Time per case (hours)	# of Cases	Total Time (hours)	
Outreach and Education	- handout and brochure production - staffing arbor day, remodeling shows, community events	No change - handout and brochure production - staffing arbor day, remodeling shows, community events Shift to Single Point of Contact			416.00			416.00			416.00	
Customer Service	Provided by Parks Urban Forestry (823-4489) but referred to BDS to determine if specific Zoning regulations apply. Caller is then referred back for permit process. Handles phone inquiries, mails application. Includes BDS Time (375 hours)	Single point of contact Front-end customer service by Single point of contact (answers BDS and UF tree questions). Handles phone and walk in inquiries, mails application or directs to on line form, sets up permit file, verifies applicability (is a LU review required?) Assigns to inspection staff when ready	0.93	1500	1392.00	0.93	2125	1976.25	0.72	2125	1540.00	Permits to be primarily administered through DSC. Single Point of Contact to be Development Service Tech Classification or equivalent. # of cases represents # calls for general info plus # of calls for concerns. Total time is aggregated from phone inquiries, responding to calls for concerns/ complaints, mailing permit applications, and setting up permit case files. Current time includes portion of BDS time.
Permit Processing Simple Permits (Type A)	Total Number of Applications	Total Number of Applications		120			262		523			Proposed # of permits is estimated by increase in proportion of lots
	Inspection -tree is dead/dying -clearly dangerous	Confirmation (Type A) -tree is dead -tree is dying/dangerous (w/arb report) -tree is w/in 10' of building -four healthy trees 12-20" in diameter -nuisance species +20" trees on SF homesites	1.00	24	24.00	1.00	175	175.00	1.00	350	350.00	Assumes: 37% of all applications are for 4 trees <20 inches from the remainder, 1/2 of the 80% that are DDD have an arborist report. From the remainder, 12.5% of the applications are for nuisance trees. Does not include reductions related to SF homesites. See note below
	Permit Decision Upon confirmation, permit is issued. No mitigation required	Permit Decision Upon confirmation, permit is issued. Tree for Tree replacement required	1.00	24	24.00	1.00	175	175.00	1.00	350	350.00	
	Permit Issued Most simple permit situations are issued on site.	Permit Issued Most simple permit situations are issued on site or through email	0.25	24	6.00	0.25	175	43.75	0.25	350	87.50	
	Replanting Inspection None for DDD trees (no replacement)	Replanting Inspection 10% spot check for all	1.00	0	0.00	1.00	18	18.00	1.00	35	35.00	
Complex Permits (Type B)	Field Observation -tree is any healthy>12" tree -tree is not clearly dangerous Complex decisions require greater analysis of criteria/hazard or risk assessment	Field Observation (Type B) -tree is 5th healthy tree -tree is any healthy>20" tree Complex decisions require greater analysis of mitigation Does not apply to SF homesites Also included in these are 1/2 DDD trees that did not include arborist report	2.60	96	249.60	2.60	87	226.20	2.60	173	449.80	Total # apps minus confirmation (Type A) apps equals Field Observation (Type B) apps. #% of Type B apps shown do not include deduction for SF homesites (~2/3 of all lots in system) See Permit Type A+B calcs at bottom.
	Permit Decision Tree Assessment required for unhealthy trees. No mitigation if approved. Criteria assessment for healthy trees. Applicant's mitigation plan negotiated for site (up to inch for inch), if approved.	Permit Decision Tree Assessment required for unhealthy trees. Tree for Tree replacement if approved. Criteria assessment for healthy trees. Mitigation rate negotiated when infeasible to plant required number of trees.	1.39	96	133.44	1.25	87	108.75	1.25	173	216.25	
	Permit Issued Upon confirmation of tree condition or receipt of adequate mitigation plan for healthy trees, permit is issued.	Permit Issued Upon confirmation of tree condition or receipt of mitigation plan for healthy trees, permit is issued.	0.25	96	24.00	0.25	87	21.75	0.25	173	43.25	
	Replanting Inspection For healthy trees only	Replanting Inspection 10% spot check for all	1.00	24	24.00	1.00	9	9.00	1.00	18	18.00	
Appeals	Total Number of Appeals	Total Number of Appeals		7			14		28			
	Applicant Appeal Any application. Typical appeal rate is: ____ Includes scheduling appeal, prep, documentation and presentation, hearing, follow up, additional communications	Applicant Appeal Any application. Assumed appeal rate is: 5% of all applications	26.60	6	159.60	26.60	13	347.93	26.60	26	695.86	
	Public Appeal Limited to any healthy trees:12" Typical appeal rate is: ____ Includes scheduling appeal, prep, documentation and presentation, hearing, follow up, additional communications. Plus Communications with public re: proposed tree removal during posting period (Inspectors handle public inquiries)	Public Appeal Limited to Non SF healthy trees:20" or more than four >12" Assumed appeal rate is:1% of Field Observation permits Includes scheduling appeal, prep, documentation and presentation, hearing, follow up, additional communications. Plus communications with public re: proposed tree removal during posting period (general and process info call would come to SPOC. Inspectors would address specific case questions)	32.51	1	32.51	32.51	1	32.51	32.51	2	65.02	
Enforcement	Total Number of Complaint Calls Accounted for in "customer service"	Total Number of Complaint Calls Accounted for in "customer service"		250			250		250			
	Site visit and verify violation Current rate is 50% of 250 complaint calls	Site visit and verify violation Assumed rate is 60% of 250 complaint calls	2.60	125	325.00	2.60	150	390.00	2.60	150	390.00	
	Case Processing Current Rate is 12% of site visits result in violation case. Set up case, review case and penalties with manager, review mitigation plan, involve management, communications, follow up inspection to close case.	Case Processing Assumed rate is 30% of site visits result in violation case. Set up case, review case and penalties with manager, review mitigation plan, involve management, communications, follow up inspection to close case.	5.66	15	84.90	5.66	45	254.70	5.66	45	254.70	
TOTALS				2895			4195		4911			
			FTE	1.39		Sum	2.02	0.62	Sum	2.38	0.97	
			COSTS (\$+B)	\$108,116		Net Δ	\$156,656	\$48,541	Net Δ	\$183,415	\$75,300	
			FULLY LOADED (OH)	\$160,011		Net Δ	\$231,851	\$71,840	Net Δ	\$271,455	\$111,444	

Type A+B calcs (Hi end)		remaining
Total Apps		523
subtract 40% (1/2 DDD, with arb rpt)		209
	equals	314
subtract 37% (12-20") from remaining		116
	equals	198
subtract 12.5%(N) from remaining		25
Final - Type B		173
Final - Type A		350

Type A+B calcs (Lo end)		remaining
Total Apps		262
subtract 40% (1/2 DDD, with arb rpt)		10
	equals	251
subtract 37% (12-20") from remaining		93
	equals	158
subtract 12.5%(N) from remaining		20
Final - Type B		138
Final - Type A		123

Note:
The assumptions regarding the split between Type A vs. B permits are based on data that can be extrapolated (tree size, condition, species population distribution). What is not reflected here are data relating to how many currently exempt properties would submit applications to remove 20" and larger trees. Even though this pool of properties accounts for almost 60% of the total pool of properties, and effectively reduces the properties subject to the current 20.42 requirements by ~20,000 lots, we simply do not have sufficient information to base an assumption on. Therefore, we have not attempted to assign a greater proportion of permit applications to the Type A permit stats which would result from the single family homesite provision, and are instead assuming the distribution of Type A and B permits is not affected by this pool of Type A properties. In other words, the numbers are likely weighted toward more Type B permits.