



PLANNING COMMISSION

WEDNESDAY, JUNE 10, 2020

II. WORK SESSIONS

- A. Urban Forest Management Plan (Rappold) (45 Minutes)



PLANNING COMMISSION WORK SESSION STAFF REPORT

| | | | |
|---|---|---|--|
| Meeting Date: June 10, 2020 | | Subject: Urban Forest Management Plan | |
| | | Staff Member: Kerry Rappold, Natural Resources Manager | |
| | | Department: Community Development | |
| Action Required | | Advisory Board/Commission Recommendation | |
| <input type="checkbox"/> Motion <input type="checkbox"/> Public Hearing Date: <input type="checkbox"/> Ordinance 1 st Reading Date: <input type="checkbox"/> Ordinance 2 nd Reading Date: <input type="checkbox"/> Resolution <input type="checkbox"/> Information or Direction <input checked="" type="checkbox"/> Information Only <input type="checkbox"/> Council Direction <input type="checkbox"/> Consent Agenda | | <input type="checkbox"/> Approval <input type="checkbox"/> Denial <input type="checkbox"/> None Forwarded <input checked="" type="checkbox"/> Not Applicable | |
| | | Comments: | |
| Staff Recommendation: Provide input on the proposed Urban Forest Management Plan | | | |
| Recommended Language for Motion: NA | | | |
| Project / Issue Relates To: <i>[Identify which goal(s), master plans(s) your issue relates to.]</i> | | | |
| <input type="checkbox"/> Council Goals/Priorities | <input type="checkbox"/> Adopted Master Plan(s) | <input checked="" type="checkbox"/> Not Applicable | |

ISSUE BEFORE COMMISSION: Provide input on the proposed Urban Forest Management Plan and upcoming process.

EXECUTIVE SUMMARY:

The City has kicked off an Urban Forest Management Plan (UFMP) to guide the City's programs and actions related to the urban forest. Active management of the urban forest is becoming more and more critical as it ages and changes. While the plan will come back to the Planning Commission as it progresses, staff wanted to inform the Commission of this important project

and get feedback on the potential content and process to develop the plan. This will be the City's first comprehensive Urban Forest Management Plan.

Wilsonville's urban forest is comprised of all trees in the city, both native and planted, public and privately-owned, that contribute to the seasonal beauty and livability of the community. Trees help clean the air, manage stormwater, conserve soil and water, reduce heating and cooling costs, provide habitat for wildlife, and bring nature to where we live, work, and play. Trees are a critical component of the City's green infrastructure and environmental stewardship goals.

The UFMP will provide an integrated approach to preserving, sustaining and regenerating Wilsonville's urban forest into the future. While the UFMP will cover the entire City, it will have two focus areas: Charbonneau and Town Center. Recommendations in the plan will address issues and topics specific to the urban forest in these areas. An important component of the UFMP will be the City's street tree inventory completed in 2018. Over 24,000 trees were inventoried and entered into the City's asset management system (i.e., Cartegraph). The inventory provides a critical starting point for developing the plan as it relates to the management of publically-owned trees.

Staff selected a consultant, PlanIT Geo, to provide the technical assistant in developing the UFMP. The consultant has extensive experience with developing urban forest management plans and providing local, regional and statewide forest resources planning throughout the U.S. and, specifically, within Oregon. Their scope of work and schedule for the project is attached, which identifies the various steps in developing the plan.

An interdisciplinary team, comprised of staff from Community Development, Public Works, and Parks and Recreation, will participate with the consultant and public in the development of the plan. The team members will provide their expertise about Wilsonville's urban forest and identify key issues to be addressed within the plan.

BACKGROUND:

In Wilsonville, a healthy and vibrant urban forest has always been a high priority. Whether seen through the colorful array of street trees or the extensive forested areas, trees play a pivotal role in the identity of the community. For twenty-one years, the City has earned the designation of a "Tree City USA" from the National Arbor Day Foundation. Wilsonville is one of only 10 cities in Oregon to earn the Tree City USA's Growth Award for innovative projects that exceed Tree City USA standards.

The City's Tree Protection code prescribes requirements for protecting and conserving trees, including those on private property. The code acknowledges the ecological services provided by trees, such as reduced air pollution and improved water quality, but also the economic contribution trees make to local property values. When it comes to historically significant trees, the Heritage Tree Program recognizes trees or groves of trees due to their age, design placement, link to important events or activities, location, persons associated with them, setting and size. For example, the R.V. Short Douglas fir at Park at Merryfield is designated a Heritage Tree as it predates European settlement of the Willamette Valley.

In partnership with Friends of Trees, the City has enhanced and restored Wilsonville's natural areas. Over the last 17 years, volunteers have installed thousands of native trees and plants. In 2019, the City started a new partnership with Friends of Trees to plant up to 100 neighborhood trees as part of the Street Tree Infill program. The Urban Forest Management Plan will build on the legacy of these efforts to ensure Wilsonville continues to have a healthy and vibrant urban forest.

EXPECTED RESULTS: The completion and adoption of an Urban Forest Management Plan.

TIMELINE: Draft and final plans will be presented to the Planning Commission for specific input.

CURRENT YEAR BUDGET IMPACTS: In the 2019-20 fiscal year budget, \$50,000 has been earmarked for the UFMP.

COMMUNITY INVOLVEMENT PROCESS: Community involvement and public outreach will be a key component of the upcoming project. Staff welcomes input from the Commission on public engagement activities for the UFMP process.

POTENTIAL IMPACTS or BENEFIT TO THE COMMUNITY (businesses, neighborhoods, protected and other groups): The UFMP will identify actions that support a healthy and regenerative urban forest across Wilsonville's public and privately-owned lands through the combined efforts of City government, businesses, and residents. It will be important to engage the community in the care of our urban forest and make them a partner in implementing the plan.

ALTERNATIVES: N/A

CITY MANAGER COMMENT: N/A

ATTACHMENTS:

- A. PlanIT Geo Scope of Work and Schedule

EXHIBIT A - SCOPE OF WORK



PROJECT OVERVIEW

The Urban Forest Management Plan (“Plan” or “UFMP”) will provide an integrated approach to preserving, sustaining, diversifying, and regenerating the City’s urban forest into the future. The Plan will include goals and objectives, an inventory and assessment, strategies, implementation actions, and monitoring—accomplished through strategic partnerships and community outreach.

While the Plan will cover the entire City, it will have two special focus areas: Charbonneau and Town Center. Recommendations in the Plan will address issues and topics specific to the urban forest in these areas—such as the 800 mature northern red oaks in Charbonneau in various states of health, and impacts to infrastructure. A better understanding will be gathered from an in-depth inventory of these trees. The Plan will address program, management, and community needs as well as recommendations for the urban forest resource derived from analyses of the 24,000+ street tree inventory completed in 2018.

The Plan will support ongoing efforts, initiatives, and plans, such as the Town Center Plan adopted in 2019. The commitment to a healthy urban forest is evidenced by Wilsonville being accredited as a Tree City USA since 1997, with numerous "Growth Awards" for outstanding efforts on urban forest projects. This status indicates the City’s long-term dedication to the care of trees that are the urban forest, as well as the City's Heritage Tree Program, which seeks to preserve trees of special historical significance.

Primary issues such as tree preservation during development, climate change, pest and disease, environmental justice, and resource allocation, among others, will be strategically planned with this effort. This Urban Forest Management Plan is the next step to achieve higher levels of urban forest management, sustainability, and equity in an ever-changing environment and community.

PROJECT APPROACH

Throughout the term of the Project, Consultant will:

| City Scope of Work Item | PlanIT Geo Proposal Approach |
|---|---|
| <p>1) Long-Term Strategy Framework: Establish a framework for a long-term strategy (minimum 25 years) to protect, conserve, and enhance the City’s urban forest with comprehensive goals and objectives. Develop specific recommendations to implement the goals and objectives.</p> | <p>3) Internal Work Plan 4) Program, Plans, Initiatives, and Meeting Alignment 5) Information Gathering</p> |

| | |
|--|--|
| <p>2) Urban Forest Status: Describe the status of the City’s urban forest, include the context (history and land use changes, environmental conditions), vegetation (canopy cover, tree inventory), and community values and issues.</p> | <p>5A) Existing Plans & Policies 5B) City Operations and Workflows 5C) Existing Conditions 5D) Benchmarking Research 5E) Community Engagement 5F) Urban Forest Audit</p> |
| <p>3) Current & Future Issues: Identify current and future issues that will affect the City’s urban forest, such as climate change, pests, and tree diversity.</p> | <p>5C) Existing Conditions 5D) Benchmarking Research</p> |
| <p>4) Urban Forestry Operations: Describe and assess the City’s overall urban forestry activities and practices, including various departments’ roles and responsibilities in permitting, management, and maintenance operations via interview or survey, and review of City documents, such as codes/ordinances. Provide recommendations on improvements to existing programs.</p> | <p>5A) Existing Plans & Policies 5B) Benchmarking Research 5D) Benchmarking Research 5F) Urban Forest Audit</p> |
| <p>5) Focus Area Goals: Develop specific goals, objectives, and recommendations for the special focus areas in Charbonneau and Town Center.</p> | <p>2) Tree Inventory & Assessment in Focus Areas 5) Information Gathering</p> |
| <p>6) Community Engagement: With City staff, identify interested parties for community engagement and develop a strategy to obtain public input. Target specific groups early in the Project via email, focus group discussion, online surveys, or applicable strategies (e.g., Let’s Talk, Wilsonville!).</p> | <p>3) Internal Work Plan 5E) Community Engagement</p> |
| <p>7) Charbonneau Community Engagement: Conduct outreach with the Charbonneau community regarding the health and condition of their urban forest.</p> | <p>3) Internal Work Plan 5E) Community Engagement</p> |
| <p>8) Plan Outreach & Education Strategy: Develop an education and outreach strategy for Plan implementation. This strategy will include, but not be limited to, website material, handouts, and presentation material for community groups.</p> | <p>3) Internal Work Plan 5E) Community Engagement</p> |
| <p>9) Monitoring Plan: Develop a monitoring plan that will allow the City to measure progress in achieving the Plan’s goals, objectives, and recommendations.</p> | <p>5F) Urban Forest Audit 6) UFMP Framework</p> |
| <p>10) Funding & Partnership: Provide recommendations on potential program funding sources or partnership opportunities for implementing the Plan.</p> | <p>4) Resource Alignment 5A) Existing Plans & Policies 5E) Community Engagement</p> |
| <p>11) Presentations: Prepare presentations of the draft and final Plans and attend meetings before the Planning Commission and City Council. Four meetings (two each) are anticipated.</p> | <p>7) UFMP Drafts, Presentations, & Final Delivery</p> |

1. Tree Inventory

Consultant will schedule the project kickoff meeting based on the desired timeline and provide a tentative agenda. Prior to kickoff, Consultant will set up the TreePlotter inventory management software application. Topics to cover during the kickoff may include:

- Project schedule, communications, meetings, and priority areas/incomplete areas
- Acquisition of tree maps and GIS data layers from the City
- Tree inventory data fields and criteria understanding and procedures
- Safety, equipment, and industry standards
- Immediate and imminent tree risk protocols
- Rights-of-way limits and criteria
- TreePlotter software app set up and training, which includes a demonstration and training to the City.

A. Web-Based GIS Data Collection

The web-based GIS tree inventory will be performed using pre-programmed computers (i.e., TreePlotter app tailored to Wilsonville with appropriate accounts) and a combination of GIS and GPS equipment using tablet and smartphone's GPS locator on map ("location services"), Google, Bing, ESRI, OpenStreetMap, local imagery basemaps with spatial lat/long data on tablet, and ISA Certified Arborist's judgement using his/her experience and observations to finalize point location and resolve any GIS/GPS signal issues.

- ❖ As inventory information is collected, data will be instantaneously stored on secure remote servers, eliminating the possibility of data loss, and making it possible for City officials to access and download, at any time, real-time data collection with secure login credentials.

B. Tree Inventory Data Fields

The following protocols and fields will be populated for each tree. Final fields will be determined at the project kickoff meeting and will be set for the duration of the Project. The common data fields requested and collected are as follows:

- Latin Name (genus and species) (automated), Common Name
- GPS Coordinates (automated), Location Address – address #, street name (autopopulated)
- Land Use – Commercial, Residential, Industrial, etc.
- Date Collected – Month/Day/Year (automated)
- DBH – diameter at 4.5' above ground measured to the nearest inch (DBH class automated)
- Maintenance Need (example fields, final fields determined during project negotiation)

- Priority 1 Removal, Priority 2 Removal, Priority 1 Pruning, Priority 2 Pruning, Large Tree Routine Pruning, Small Tree Routine Pruning; others based on Focus Area Goals
- Condition – overall condition of the tree at time of inventory (Excellent, Good, Fair, Poor, Dead)
- Observations – Each visual apparent structural defect will be individually noted
- Notes: Noteworthy information not included in above fields

C. Quality Control and Accuracy

Consultant will provide the City with a professional, courteous, and informative tree inventory project experience, beginning with high-quality tree inventory data.

- All technicians working on this Project will have an ISA Certified Arborist Credential
- During the inventory process, extensive quality control checks will be applied regularly
- The City may periodically perform on-site verification of the data
- If any errant tree site location is detected, Consultant will correct the data promptly

D. Format for Inventory Data Deliverables

Successors and assigns will deliver tree inventory data in the following formats (final determined at kickoff):

- Microsoft Excel – compatible with i-Tree Streets and ESRI GIS shapefile and/or geodatabase
- Electronic copy of data on a USB flash drive or CD and Access/export data at any time at no cost

2. Project Award and Kickoff

Consultant will coordinate a project kickoff meeting with the City’s desired audience to discuss the purpose, timeline, approach, and opportunities to engage. The City will assist in determining the final presentation for the kickoff meeting.

The project kickoff meeting with the City project team will focus on the development of the Urban Forest Management Plan (“Plan” or “UFMP”), and will include the following topics:

- Desired level of planning services
- Plan outline, project timeline, and Plan format
- Planning horizon (e.g., 25-year Plan with 5-year strategies and milestones)
- Focus areas (Charbonneau and Town Center) discussion

- Information gathering procedures and available resources
- Project team, internal/external stakeholders, target audience, and dissemination methods
- Pictures, images, logos, and acknowledgements
- Draft review and revision processes
- Appendices and maps (including inventory maps)
- Tree inventories and assessments approach (in focus areas)

3. Tree Inventory and Assessment in Focus Areas

Based on the kickoff meeting, Consultant staff will coordinate the inventory and assessment of trees in the focus areas, using TreePlotter software to conduct the inventory and gather attributes as determined at kickoff. This information will be used to inform the UFMP, in addition to the analysis of the 24,000 trees in the City’s existing system.

4. Internal Work Plan

An internal work plan will be developed based on decisions determined during the project kickoff meeting. The work plan will provide guidance for the project team and a summary that can be utilized by City staff to share with other departments, stakeholders, and partners. Topics provided in the work plan may include:

- UFMP Outline
- Timeline, Meeting Schedule, and Milestones
- Summary Approach
- Content Decisions
- Format Decisions
- Community Outreach Strategy (project website, public meeting, public survey)
- Partners and Stakeholders

5. Resource Alignment (Programs, Plans, Initiatives, Meetings)

Successful UFMP development relies on the momentum and support of planned and ongoing City efforts. Early in the planning process, Consultant will identify potential programs, plans, initiatives, and organizational meetings that could align with phases of the UFMP Project. The City will provide feedback and input. Outcomes of this effort will assist in finalizing the Internal Work Plan while staying within this Project’s scope and budget. Examples of this alignment process include:

- Existing community neighborhood outreach events
- Existing programs, initiatives, and projects
- Stakeholder and partner meeting schedules
- City Council and subcommittee meeting schedule and process

- Cultural and ethnic challenges and opportunities to encourage equity of services and outcomes

6. Information Gathering

Consultant will work with the City project team to gather information to inform the Plan. This information may include current tree management procedures, staffing, equipment, budget, service requests, in-house and contractual tree maintenance procedures, and existing plans and reports relating to tree management and the community forest. This information may be collected by completing a questionnaire prepared by Consultant, conducting surveys, and/or phone calls.

The information gathering process will consist of the following planning elements and approaches to achieve Scope of Work items 1-11 in the City's RFP:



A. Existing Plans and Policies

During the information gathering processes, all relevant plans, resources, programs, and initiatives will be reviewed to measure the City's readiness for improved urban forest management and sustainability. This includes review of codes and ordinances.

- ❖ Consultant will conduct research following the USFS Urban Forest Sustainability & Management Audit System (see item F for information about the Urban Forest Audit). Consultant will send the City project team a request for information, and the City project team will send Consultant available resources. Existing plans and policies will be filed on Google Drive, indexed, and summarized.



B. City Operations and Workflows

The existing operations and workflows will be understood and analyzed through a series of surveys, questionnaires, meetings, and requests for information.

- ❖ In coordination with the City project team, Consultant will facilitate an in-person meeting(s) with City staff, stakeholders, and partners. Consultant will send a brief questionnaire to key individuals and work groups identified by the City project team prior to in-person meeting(s). Current operations and workflows will be discussed and defined, along with resource and information gaps. Information gathered will be summarized in the Research Summary and applied to the UFMP.



C. Existing Conditions

The existing urban forestry conditions and trends will be analyzed using available data such as tree inventories, canopy assessments, i-Tree Eco surveys, and other relevant datasets. Prior to data analysis, Consultant's ISA Certified Arborists will collect tree inventory data for the focus areas (northern red oaks in Charbonneau and the trees in the redevelopment area of Town Center). See step 2 for more information.

- ❖ Data from the existing tree inventory will be acquired from the City. Additional relevant datasets will be acquired and analyzed to identify existing urban forestry conditions. Data analysis summaries will be detailed in the Research Summary, and results of the data analyses will be applied to the UFMP.



D. Benchmarking Research

Consultant will conduct benchmarking research, comparing jurisdictions similar in size, location, structure, and other attributes, to inform the development of realistic and achievable goals and strategies for the City's urban forestry program.

- ❖ Consultant will provide the City project team with ~5 comparable cities for benchmarking research and comparison. Consultant will then provide the City project team with attributes to attain from research. A table or matrix will summarize the information discovered for the cities and compared to Wilsonville. Information will be summarized in the Research Summary and applied to the UFMP.



E. Community Engagement

Consultant will facilitate public meeting(s), public surveys, and/or an interactive UFMP project website to gather input and feedback.

- ❖ Consultant will set up a UFMP project website and complete the Kickoff Meeting (1st Community Outreach Meeting, optional). Consultant will complete the UFMP Internal Work Plan to include the community engagement approach, followed by the 1st Round Public Survey (web). Consultant will complete the 2nd Community Outreach Meeting to inform UFMP vision, goals, and strategies, followed by the 2nd Round Public Survey (web). Consultant will provide for a UFMP Draft Public Review Period, and then will conduct a 3rd Community Outreach Meeting to discuss the final UFMP. Consultant will provide up to four community outreach and education materials (fliers, postcard, handout, etc.).



F. Urban Forest Audit System

Consultant will utilize the [US Forest Service's Urban Forest Sustainability and Management Audit](#), which consists of 11 community forestry categories to facilitate the collection of necessary information and identify program and resource gaps. Information gathered from the previous planning elements (A-E) will inform this Audit. With this Audit, urban forest resource, management, and community goals as it relates to the City's urban forest will be informed.

- ❖ All previous planning elements will be completed, and Round 1 of the Urban Forest Audit System will be completed by Consultant and reviewed by the City project team. Round 2 of the Urban Forest Audit System will be completed by Consultant the and City

project team via web-conference call. The final Round 3 of the Urban Forest Audit System will be completed for use in the Research Summary and applied to the UFMP.

7. Research Summary

The findings from the aforementioned planning elements (A-F) will be summarized in a research summary document. This document will be structured to serve as a reference and guide to the final UFMP.

8. Urban Forest Management Plan Framework and Development

Based on the Research Summary (Existing Plans and Policies, City Operations and Workflows, Existing Conditions, Benchmarks, Community Engagement, Urban Forest Audit), the Urban Forest Management Plan will be developed to provide short- and long-term goals, with the strategies and actions to achieve higher levels of service as it relates to urban forest management, sustainability, equity, and other goals identified in the process.

The Plan will include the results of all prior tasks and develop a strategic plan for achieving the established values, goals, and objectives. The Plan will also describe recommended staffing, resources, funding, and funding mechanism for each strategy. Finally, the Plan will include measures and milestones to evaluate success.

9. Urban Forest Management Plan Drafts, Presentations, and Final Delivery

Consultant intends to provide a project experience that consists of frequent reviews and input periods by the City project team to provide effective, meaningful, and relevant recommendations in the UFMP, as follows:

1. City project team reviews and provides feedback on the UFMP Internal Work Plan, community engagement strategy, UFMP Outline, UFMP project website, approach and outcomes of the six Planning Elements, draft Research Summary, draft goals-strategies-targets-actions-adaptive management measures-monitoring measures, three draft reviews, and draft presentations (2) for Planning Commission and (2) City Council.
2. The final UFMP is prepared and delivered as a MS Word and Adobe PDF document for print and digital versions, and UFMP website hosting is transferred to the City after project contract.
3. Supporting data, maps, and information are delivered to the City (i.e., tree inventory analysis, focus area assessments, information discovered, public survey analysis, meeting notes, etc.).

PROJECT SCHEDULE

The proposed timeline is set forth below. The final timeline will be determined during project negotiation and the final Internal Work Plan. Consultant has the capacity to complete the services of this RFP within a narrower timeline if deemed necessary for the City's objectives.

| | | Project Management | | | | | | | | | | |
|-----------------------|--|---|---------|---------|---------|---------|---------|---------|---------|---------|---------|---|
| Task | Sub-task | Month 1 | Month 2 | Month 3 | Month 4 | Month 5 | Month 6 | Month 7 | Month 8 | Month 9 | | |
| Project Management | Project Negotiation | X | | | | | | | | | | |
| | Project Kickoff Meeting | X | | | | | | | | | | |
| | Bi-Weekly Updates | | X | X | X | X | X | X | X | X | X | X |
| | | Urban Forest Management Plan | | | | | | | | | | |
| SOW # | RFP SOW Abbreviation | Sub-task | Month 1 | Month 2 | Month 3 | Month 4 | Month 5 | Month 6 | Month 7 | Month 8 | Month 9 | |
| 2 | Urban Forest Status | Focus Areas Tree Inventories | X | X | X | | | | | | | |
| 1 | Long-Term Strategy Framework | Internal Work Plan | X | | | | | | | | | |
| 1 | Long-Term Strategy Framework | Plan Outline | | X | | | | | | | | |
| 2 | Urban Forest Status | Resource Alignment | | X | | | | | | | | |
| 2 | Urban Forest Status | Existing Policies & Plans | | X | X | X | | | | | | |
| 4 | Urban Forestry Operations | City Operations & Workflows | | | X | X | X | | | | | |
| 2 | Urban Forest Status | Existing Conditions | | X | X | X | X | X | | | | |
| 3 | Current & Future Issues | | | | | | | | | | | |
| 5 | Focus Area Goals | | | | | | | | | | | |
| 2 | Urban Forest Status | Benchmarking Research | | | | X | X | X | | | | |
| 6 | Community Engagement Charbonneau Engagement Plan Outreach Strategy | Community Engagement Strategy | X | | | | | | | | | |
| | | UFMP Website | | X | | | | | | | | |
| | | 1st Community Meeting | X | | | | | | | | | |
| | | 1st Public Survey | | | | X | | | | | | |
| | | 2nd Community Meeting | | | | | | X | | | | |
| 8 | Plan Outreach Strategy | 2nd Public Survey (optional) | | | | | | X | | | | |
| 3rd Community Meeting | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| 1 | Long-Term Strategy Framework | Urban Forest Audit System | | | | X | X | | | | | |
| 2 | Urban Forest Status Monitoring Plan | | | | | | | | | | | |
| 9 | Plan | | | | | | | | | | | |
| 1 | Long-Term Strategy Framework | Research Summary | | | | | X | X | | | | |
| 1 | Long-Term Strategy Framework | Plan Writing | | X | X | X | X | X | X | X | X | |
| 9 | Monitoring Plan | Plan Drafts | | | | | X | | X | | X | |
| 11 | Presentations | Presentations (2 Planning Commission, 2 City Council) | | | | | | | X | | X | |
| | | Final Delivery | | | | | | | | | | X |

Schedule Summary: Project kickoff meeting, 3 community meetings, 2 public surveys, tree inventories in focus areas, in-person City staff meeting, information gathering, auditing and gap analyses, Research Summary, Plan development, 3 draft reviews, 4 presentations, 1 final interactive Plan.