

CITY PROCEDURE



POLICY NUMBER: C456C

AUTHORITY: City Manager

EFFECTIVE DATE: TBD

TITLE: Corporate Tree Management and Tree Reserve Procedure

1. DEFINITIONS

Administrative Costs include all expenses incurred by the City of Edmonton for personnel and overhead costs including, but not limited to, costs associated with City Trees assessments and Tree Maintenance coordination.

Acquisition can be from a number of processes; including, but not limited to final acceptance of new trees from development or capital projects, trees acquired through land acquisition, dedications or purchases and retention of existing trees on developable lands.

Boulevard and Open Space Trees means all City Trees excluding trees in Natural Stand.

City of Edmonton Urban Forest is all City Trees within the Edmonton City limits.

City Trees means all trees and shrubs located on City-owned land including, but not limited to, titled City land, parkland, road right of way, environmental reserve, municipal reserve, public utility lots and urban services zones.

Corporate Tree Management is a process in which decisions are made about ecological, administrative, social, legal, technical and scientific activities in the CoE Urban Forest.

Equitable Compensation

(a) *For Boulevard and Open Space Trees:* means all costs incurred by the City including labour, material, equipment charges and applicable overheads associated with the value of the City Tree or the diminishment of the City Tree's value, as determined by the document titled *Guidelines for Evaluation*

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of Trees, a documented methodology that is set forth in the most current edition of the *Guide for Plant Appraisal* authored by the Council of Tree and Landscape Appraisers and published by the International Society of Arboriculture.

(b) *For Natural Stand areas*: means the compensation value for such treed areas as determined by the document titled the *Natural Stand Valuation Guidelines*, a methodology canopy document that was adapted with reference to the Alberta Agriculture publication, *A Guide to Determining Replacement Value of Trees and Shrubs in Alberta*, Section 3 (AGDEX 275/33-3).

Growth can be in the form of a number of processes; including, but not limited to new plantings, naturalization efforts, and the expansion and regeneration of natural stands.

Natural Stand means all City Trees that are part of a natural area or naturalized site.

Parkland is any property, whether developed or not, owned, controlled or maintained by the City as defined by Bylaw #2202 (Parkland Bylaw).

Reserve Accounts represent amounts appropriated from accumulated surplus for designated requirements.

Site rehabilitation or restoration is the process of rebuilding soil and site conditions (may include site preparation efforts) and revegetating sites to a reference habitat state or to have similar end land use as was originally on the site.

Sustainability is a process of maintaining ecological, social and economic stability of the CoE Urban Forest.

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Stewardship encompasses the responsible care and long-term sustainability of the CoE Urban Forest, which will consist of applying emergent research, ecological principles and best management practices to guide the nature and extent of tree maintenance.

Third Party Funding is a voluntary transfer of property either in a form of monetary gift (cash, cheques, credit card payments) or gift-in-kind. This is generally a sum of money received from a private entity for the purposes of planting trees on public land.

Tree Buy-outs are agreements made and funds received from development or capital projects for the buy-out on Servicing Agreement or capital projects, upon agreement with the City Manager, to transfer site deficiencies to the City to achieve a Final Acceptance Certificate.

Tree Establishment are tree maintenance actions that take place to ensure the root establishment of newly planted trees. The establishment period is the first three years of a newly planted trees' life.

Tree Maintenance is work conducted on City Trees by trained urban forestry personnel including, but not limited to, pruning, watering, fertilizing, lighting, removal, stump grinding, root management and exploration, planting, pest management, support systems, soil vertical mulching and aeration, treatments to improve or sustain tree health and condition, inventory, assessment and valuation.

Tree Preservation is the act of conserving and protecting City Trees from damage, impacts or loss; including, but not limited to replacement plantings, transplanting, inspecting and maintaining trees.

Tree Protection is the act of protecting or using barriers and other technologies techniques to prevent or minimize damages or impacts to City Trees in critical root, stem or canopy areas of trees.

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2. PROCEDURES

2.1. Responsibilities of City Manager:

- 2.1.1. Recommend to City Council approval of this Policy and amendments thereto.
- 2.1.2. Recommend transfers to and from the Corporate Tree Reserve through the budget approval process.

2.2. Responsibilities of Deputy City Manager of City Operations:

- 2.2.1. Ensure that Departments are aware of this Policy and have access to contact information for City Operations representatives who enforce this Policy, its intent and procedures.
- 2.2.2. Request the necessary resources and provide the direction that may be required to meet the obligations of this Policy. Develop and recommend an appropriate budget for the administration and implementation of the Policy.
- 2.2.3. Ensure that the requirement to comply with the Tree Preservation Guidelines and this Policy are included in contract and tender packages under “special provisions.”
- 2.2.4. Ensure that the Tree Preservation Guidelines are followed on all City related work adjacent to City Trees.
- 2.2.5. Identify upcoming projects that may impact City Trees and ensure projects follow all applicable policies, procedures, guidelines and bylaws related to this Policy.
- 2.2.6. Disburse funds from the Tree Reserve for expenditures in the operational areas responsible for City Tree planting and other programs as described in Section 3 of this procedure.
- 2.2.7. Ensure costs eligible for funding from the reserve are in alignment with Section 3 of this procedure.

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- 2.2.8. Ensure that the funds accumulated within this reserve are being used in accordance with budget and the intended purpose of the reserve.
- 2.2.9. Ensure sound financial management of the reserve, including annual review of the reserve fund balance for the purposes of determining sustainability of corporate tree management activities. Should projections indicate that reserve funds are insufficient to meet planned expenditures, the Deputy City Manager of City Operations will review both funding levels and planned expenditures, and adjust as required to ensure expenditures do not exceed the available funding from the reserve.

The Deputy City Manager of City Operations (or their delegate) is responsible to prepare and authorize such instruction or specification and resources necessary to properly implement the following:

- 2.2.10. **Acquisition:**
 - 2.2.10.1. Ensure the orderly development and growth of the City's tree inventory and CoE Urban Forest through new plantings, replacement plantings, and inventory from new development and capital programs in accordance with applicable bylaws.
 - 2.2.10.2. To provide key stakeholder content to the updates of *Volume 5 of the City of Edmonton's Landscape Design and Construction Standards*.
 - 2.2.10.3. Encourage the integration of existing Natural Stands and CoE Urban Forest into future Open Space development on City owned land.
 - 2.2.10.4. Adopting research and development, best management practices, and innovations that contribute to the goal of urban forestry acquisition, protection and preservation, and Tree Maintenance.

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2.2.11. Tree Maintenance:

- 2.2.11.1. Inspect and evaluate City Trees for damage, condition, value, and maintenance requirements.
- 2.2.11.2. Assess the monetary value of Boulevard and Open Space Trees to determine Equitable Compensation for City Trees using the *City of Edmonton Guidelines for Evaluation of Trees (Guidelines for Evaluation of Trees)*.
- 2.2.11.3. Assess the monetary value of Natural Stand trees to determine Equitable Compensation for City Trees using the *City of Edmonton Natural Stand Valuation Guidelines (Natural Stand Valuation Guidelines)*.
- 2.2.11.4. Assist other departments with Tree Maintenance and assessing the monetary value of Boulevard and Open Space Trees and Natural Stand trees.
- 2.2.11.5. Coordinate all required Tree Maintenance as per the City of Edmonton service levels and best management practices.
- 2.2.11.6. Grant permission and provide conditions for Tree Maintenance to be completed by other public or private entities, on a case-by-case basis at the discretion of the City.
- 2.2.11.7. Ensure all Tree Maintenance is conducted in accordance with applicable bylaws and policies referenced above concerning all City Trees within Edmonton.

2.2.12. Tree Protection and Preservation:

- 2.2.12.1. Develop and maintain City of Edmonton Tree Preservation Guidelines.
- 2.2.12.2. Ensure work on or near City Trees is in accordance with the Tree Preservation Guidelines.

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- 2.2.12.3. Review project plans that impact City Trees and ensure Tree Protection and Tree Preservation is in accordance with the Tree Preservation Guidelines.
- 2.2.12.4. Recover tree maintenance costs for Tree Maintenance completed above base service level and in accordance with the Tree Preservation Guidelines.
- 2.2.12.5. Ensure work on or near City Trees occurs in accordance with the applicable bylaws, policies, procedures and guidelines concerning City Trees and City-owned land including, but not limited to, titled City land, Parkland, road right of way, environmental reserve, municipal reserve, public utility lots and urban services zones.
- 2.2.12.6. Ensure that City Trees are adequately protected from destruction, loss or damage. Pursue Equitable Compensation from the public or private entity causing the damage or loss where partial or complete loss of City Trees occurs as a result of not complying with Tree Preservation Guidelines or bylaws and policies referenced in this Policy, Equitable Compensation, City Tree maintenance and administrative costs will be recovered from the public or private entity causing the damage or loss. All compensation recovered will then be deposited into the Tree Reserve.
- 2.2.12.7. Provide key stakeholder comments and direction on corporately driven strategic plans, policies and documents that may impact CoE Urban Forest.

3. TREE RESERVE

- 3.1. Reserve transfers will be recommended and approved annually through the budget process to support acquisition, tree maintenance, and tree protection and preservation activities as described in Section 2 of this Procedure.

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- 3.2. In accordance with City of Edmonton Policy C217D Reserves and Equity Accounts, the Chief Financial Officer will undertake a detailed review of the Tree Reserve every three years as a part of the City of Edmonton's reserve review process.
- 3.3. Allocation of Equitable Compensation and Revenue(s) to and from the Tree Reserve will be done through the budget process.
- 3.4. The balance of the Tree Reserve will be reported to City Council as a part of the financial reporting process.
- 3.5. Amounts eligible for transfer into the Tree Reserve due to application of Equitable Compensation will be in accordance with this City Procedure. The Tree Reserve funding is generated from:
 - 3.5.1. Recovery of Equitable Compensation for the partial or complete loss of CoE Urban Forest from a public or private entity causing the damage or loss, as outlined in Policy and supporting documents *Guidelines for Evaluation of Trees* and *Natural Stand Valuation Guidelines*.
 - 3.5.2. Recovery of costs associated with City Tree Buy-outs.
 - 3.5.3. Third party funding from public or private entities for the purpose of urban forest procurement, growth, maintenance, protection and preservation on public lands.
 - 3.5.4. Recovery of funds for multi-year tree maintenance required due to partial loss as defined by the Policy.
 - 3.5.5. Recovery of funds for multi-year tree maintenance associated with the treatments and mitigation plans as outlined in the City of Edmonton Tree Preservation Guidelines.
 - 3.5.6. Funds received for commemorative tree planting through the Commemorative Tree Program.

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- 3.6. Eligible expenditures to be funded from the Tree Reserve include:
 - 3.6.1. Replacement of CoE Urban Forest and tree establishment of newly planted City Trees.
 - 3.6.2. Funds generated from 3.5.2 will only be spent on planting of new City Trees, tree establishment of any newly planted City Trees and/or tree maintenance (including tree removal and stump grinding) as outlined in the Tree Buy-out agreement.
 - 3.6.3. Where possible funds generated from 3.5.3 will be spent as prescribed by the conditions of the entity providing the third party funding or at City Council's request. If criteria are not specified, the City of Edmonton will distribute funds as required, as per uses identified in 3.6.1, 3.6.4 to 3.6.9 of this Procedure.
 - 3.6.4. Logistics and execution of planting through the replacement and growth of the CoE Urban Forest.
 - 3.6.5. City Tree maintenance costs for partial losses to City Trees.
 - 3.6.6. Research and development that contributes to the goal of canopy acquisition, protection and preservation, and tree maintenance.
 - 3.6.7. Public engagement and education related to work that is completed related to corporate tree management.
 - 3.6.8. City Tree planting site rehabilitation or restoration.
 - 3.6.9. Costs associated with Commemorative Tree plantings.
 - 3.6.10. Costs associated with tree maintenance in the event of a significant natural disaster or pest outbreak.
- 3.7. Reserve funds should only support corporate tree management initiatives and programs.

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- 3.8. Transfers to and from the reserve will be reported to City Council consistent with the budget approval and financial reporting process.
- 3.9. The reserve shall not be permitted to fall into a deficit position. As indicated in section 2.2, should projections indicate that reserve funds are insufficient to meet planned expenditures, the Deputy City Manager of City Operations will review both contribution levels and planned expenditures, and adjust as required to ensure expenditures do not exceed the available funding from the reserve.
- 3.10. In accordance with the City of Edmonton Reserve and Equity Accounts Policy C217D, the Tree Reserve will not accrue interest as its primary purpose is not to maintain future capital purchasing power and because there are no external requirements based on legislation or agreements requiring a reserve of this nature.