# The Evolution of the Consulting Arborist into a Design Professional







# What We Will Discuss

- 40 years of change in our industry
- Who are Consulting Arborists and Design Professionals
- Engaging in the Design Process
- Case Studies













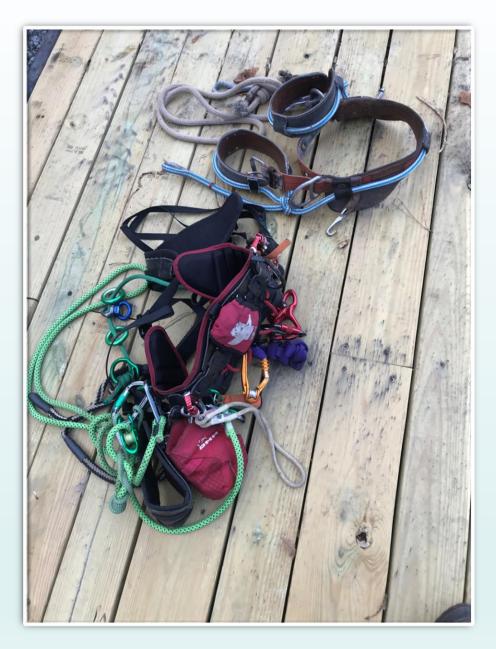










































# Who is a Consulting Arborist ?

A consulting arborist is the authoritative expert on trees and brings an objective, comprehensive viewpoint to their clients – ensuring the safety, health and preservation of trees.

The Clients of the consulting arborist include:

- Property Owners
- Municipalities
- Contractors
- Attorneys
- Insurance Professionals
- Landscape Architects
- Developers
- Engineers
- Other Arborists





asca-consultants.org



# What Services could a

# **Consulting Arborist Provide?**

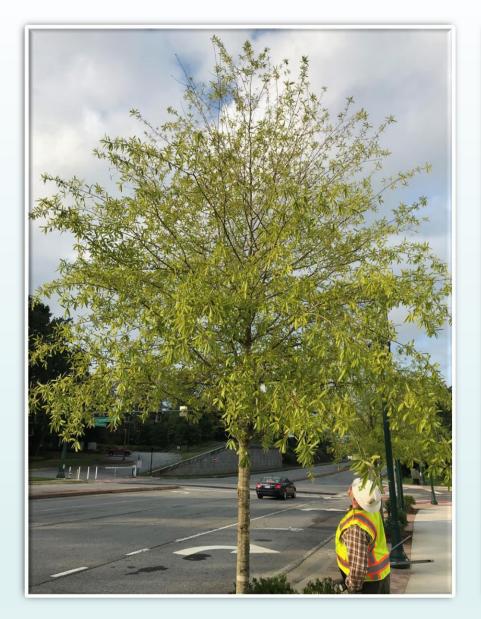
- Contract Preparation and Supervision
- Diagnosis of Tree and Landscape Problems
- Expert Witness and Litigation
- Forensic Investigations
- Tree Risk Assessments and Surveys
- Insect Disease Identification and Management
- Municipal Ordinance Development
- Plant Healthcare Programs
- Training and Education
- Tree, Landscape, and Nursery Appraisals
- Tree Management for Arboreta, Golf Courses, and Nurseries
- Tree Plant Inventories
- Tree Planting Programs
- Tree Protection for Construction Projects

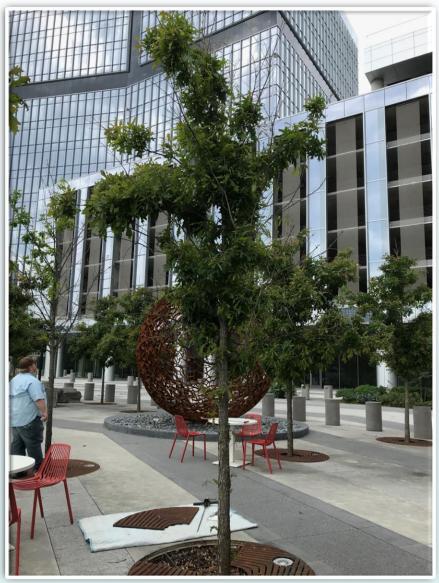










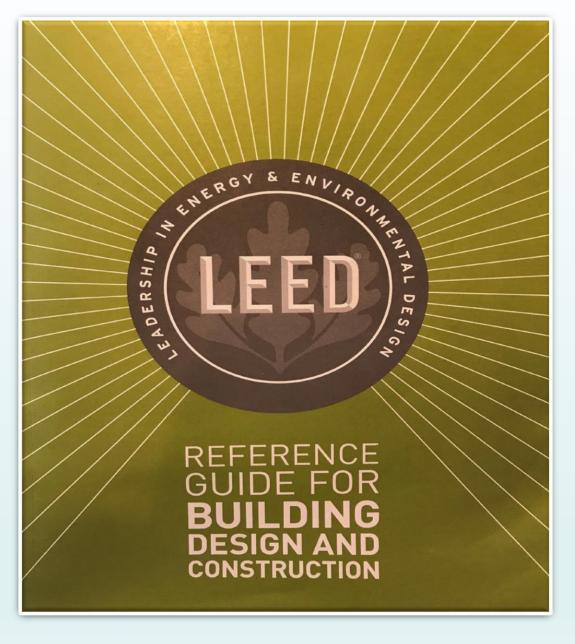










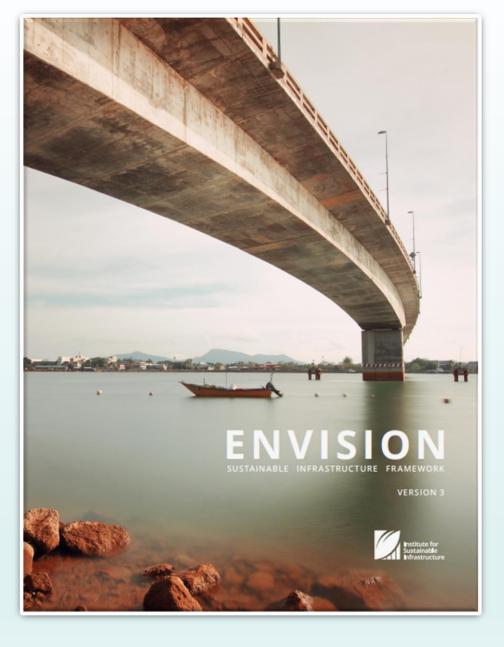






www.usgbc.org



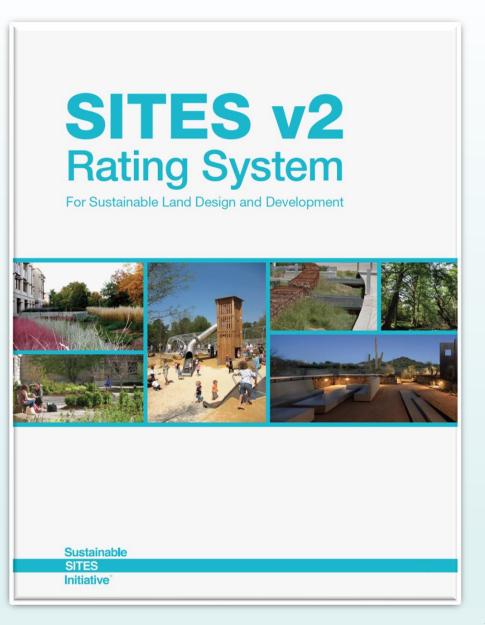






sustainableinfrastructure.org



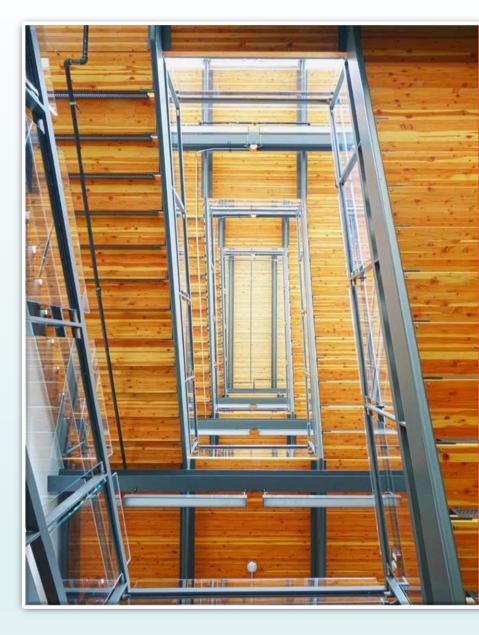






http://www.sustainablesites.org/







## LIVING BUILDING CHALLENGE<sup>™</sup> **4.0**

INTERNATIONAL

A Visionary Path to a Regenerative Future

**JUNE 2019** 





https://www2.living-future.org/









https://climatepositivedesign.com/challenge/



# i-Tree Design

## design.itreetools.org

Web application (any web browser)

Homeowner / Parcel level tool.

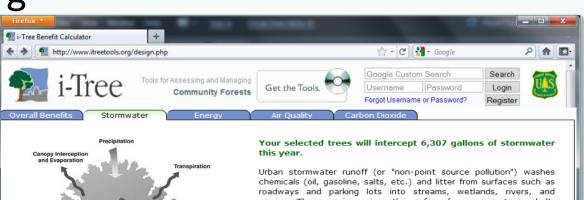
#### Easy to use.

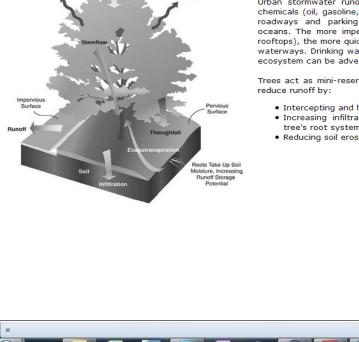


Solutions Naturally.

Arborguard

Tree Specialists





Georg

Sustaining Georgia's Green Legacy

Urban stormwater runoff (or "non-point source pollution") washes chemicals (oil, gasoline, salts, etc.) and litter from surfaces such as roadways and parking lots into streams, wetlands, rivers, and oceans. The more impervious the surface (e.g., concrete, asphalt, rooftops), the more quickly pollutants are washed into our community waterways. Drinking water, aquatic life, and the health of our entire ecosystem can be adversely affected by this process.

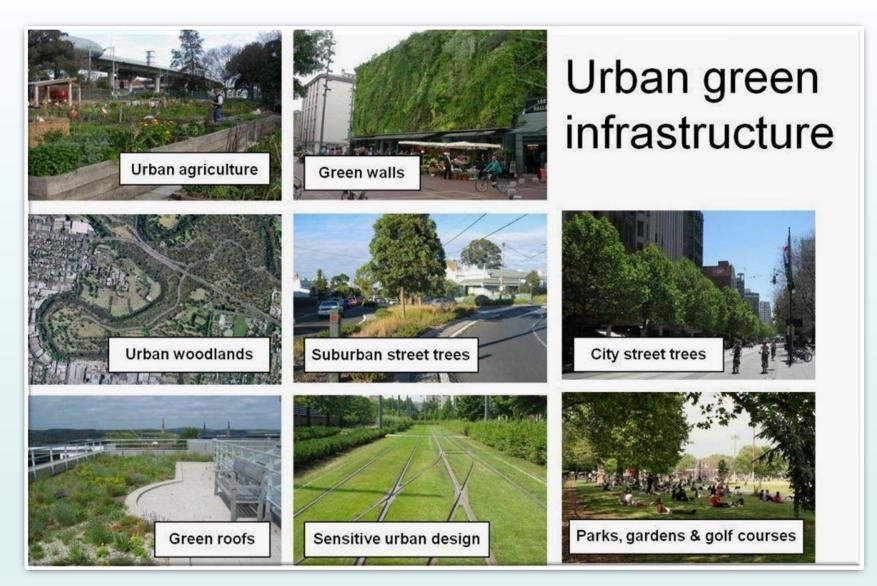
Trees act as mini-reservoirs, controlling runoff at the source. Trees reduce runoff by:

- Intercepting and holding rain on leaves, branches, and bark
- Increasing infiltration and storage of rainwater through the tree's root system
- Reducing soil erosion by slowing rainfall before it strikes the soil





W McAfee







climatechange.lta.org/green-infrastructure/



The Atlanta BeltLine will require SITES certification for future parks



Currently, Atlanta BeltLine sustainability guidelines <u>require compliance</u> with the <u>SITES Rating System</u>, ensuring that the Atlanta BeltLine corridor will be built using best practices in green design and construction.





Jasmine Day, 12 Jul 2018



## Austin will require all future Parks and Recreation projects to achieve SITES certification



Solutions Naturally. Arborguard Tree Specialists By Hannah Su • July 27, 2022 • News, ProfessionalPractice, Southwest, Sustainability







Image credit: mandritoiu, Adobe Stock. Rebecca Price Aug 05, 2022

### Rhode Island Amends its Green Buildings Act

The legislation expands the requirement that public projects meet a <u>LEED</u>, <u>LEED for Neighborhood</u>

<u>Development</u> and/or <u>SITES</u> certification to include public buildings, public structures and public real property of cities and local governments. The original law applied to state projects, state agencies and "political subdivisions thereof."

aining Georgia's Green Legacy

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www.usgbc.org/articles/rhode-island-amends-its-green-buildings-act











## The Future ...

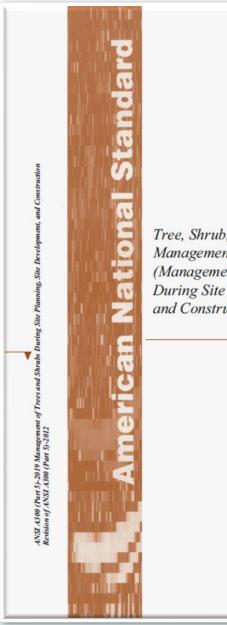
### Who will take care of our urban forests?

- Civil Engineer? Urban Planners? Watershed? Landscape Architects? Director of the Arborist Division?
- Trees as Green Infrastructure
- Climate Change will drive species selection
- Future ordinance writers making it mandatory for a consulting arborist to be part of the design team
- Sadly, arborists are not recognized as professionals
- No Credential available that specifically addresses Arboriculture with Site Design in mind









ANSI A300 (Part 5)-2019 Revision of ANSI A300 (Part 5)-2012

Tree, Shrub, and Other Woody Plant Management Standard Practices (Management of Trees and Shrubs During Site Planning, Site Development, and Construction)





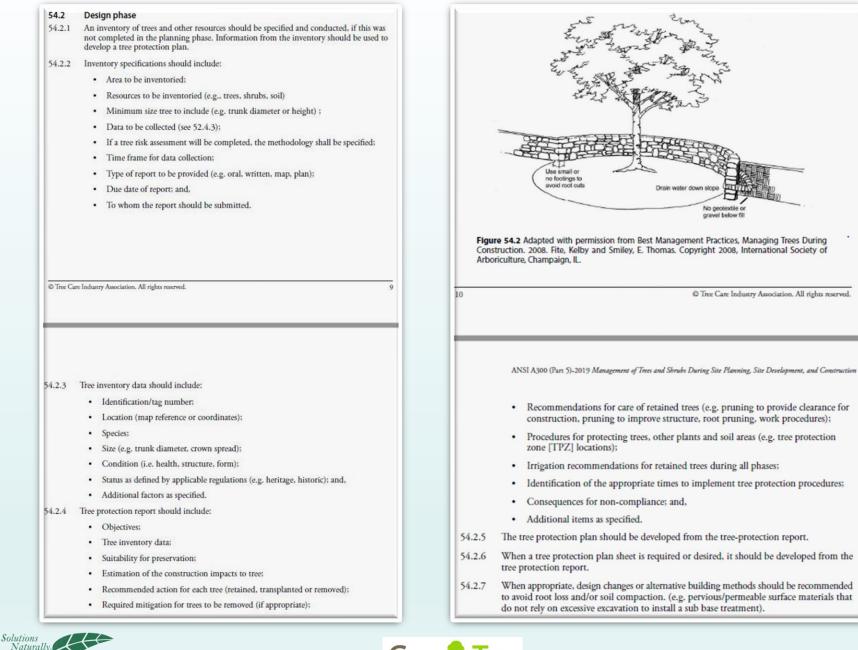




A Division of The Davey Tree Expert Company

tcia.org

Georgia Tree COUNCIL Sustaining Georgia's Green Legacy





tcia.org

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Arborguard

Tree Specialists

# **Elements of Project Evolution**

# •Concept

•Request for Proposal (RFP)

•Schematic Design (30%)

•Design & Development (60%-90%)

•Construction Documents (100%)









## **REQUEST FOR QUALIFICATIONS**

### PROFESSIONAL DESIGN AND CONSULTING SERVICES

FOR

#### ATLANTA BELTLINE WESTSIDE TRAIL EXTENSION

#### STATEMENTS OF QUALIFICATIONS DUE: Monday, September 9, 2019, 3:00 PM, EST

Envelope(s) shall be sealed and marked with Project Title and Firm Identified





Courtesy of Atlanta Beltline, Inc.





#### 3. PROJECT TEAM

Include an organizational chart and task matrix detailing the division of responsibilities. Provide a professional resume for the key personnel, including key personnel of any joint venture member, or major subconsultants proposed to be assigned to the Project. Describe their unique qualifications and relevant experience on similar or related projects. Describe key personnel's proposed roles and responsibilities on this Project. Resumes should be included in the Attachments/Supporting Materials section of the response. Submittals must identify a proposed Project tasks and would be the primary point of contact with your firm. Describe the Project Manager's experience with similar projects and with managing and leading interdisciplinary teams. List other projects to which the proposed Project Manager is currently assigned.

#### 4. TEAM EXPERIENCE

Submit minimum of five examples of projects that are reflective of the subject of this Project, including references. For each example, identify the type of project, size, budget, Respondent's role, client name and contact information, and indicate what role (if any) the proposed Project Manager or other team members had on the related project. When submitting projects for which an individual firm worked in an auxiliary capacity or in a joint venture or partnership, please include the name of the lead firm. Please remember that any extensive descriptions of vaguely related projects are discouraged and could negatively impact the overall outcome of the evaluation.





Courtesy of Atlanta Beltline, Inc.

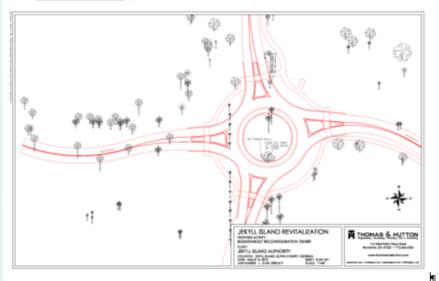




#### Project-Experience¶

#### Jekyll·Island·Beach·Village·Renovation,·Jekyll·Island,·Georgia.¶

On-this-project-Mr. Dechant-provided-consulting-services-related-to-plan-review, interfaced-with-the-Design-and-the-Ownership-Teams-to-implement-design-changesas-needed-to-protect-valuable-Live-Oak-tree-resources-within-the-limits-ofdisturbance...Produced-and-implemented-a-comprehensive-tree-conservationprogram-with-an-innovative-fine-system-to-discourage-needless-tree-damage...Healso-supervised-the-demolition-of-existing-structures-adjacent-to-all-protected-trees... 34-Live-Oak-trees-ranging-in-size-from-11"-in-diameter-to-31"-in-diameter-wererelocated-under-the-oversite-of-the-project-arborist...There-was-a-100%-survivalrate-of-the-relocated-trees...This-\$30.2-million-project-was-completed-in-the-springof-2012...Cliff-Gawron,-with-the-Jekyll-Island-Authority-and-Director-of-Landscapeand-Planning,-381-Riverview-Drive-Jekyll-Island,-GA-31527,-912-635-4099,cqawron@iekyllisland.com-was-my-primary-project-contact...The-unique-nature-ofthis-project-was-recognized-by-the-Georgia-Urban-Forestry-Council-and-received-its-2013-<u>Excellence-in-Urban-Arboriculture-Award</u>-and-received-the-Urban-Ag-Council's-2013-Green-Star-Award.¶



Original·plan·showing·40"·Live·Oak·tree·at·bottom·of·Roundabout,·high·likelihood·of· dying·within·3·years·in·this·scenario¶







#### **SECTION 6 - EVALUATION CRITERIA**

Each submittal shall be evaluated on the following criteria weighting and maximum points as follows:

Evaluations of the responsive submitted SOQS	
Firm Description	10 Points
Project Team	20 Points
Team Experience	<u>20 Points</u>
	50 Points
Evaluation of Short-Listed Firms Only	
Project Understanding/Proposal	35 Points
Interview/Presentation	<u>15 Points</u>
	50 Points

Evaluations of the responsive submitted SOOs

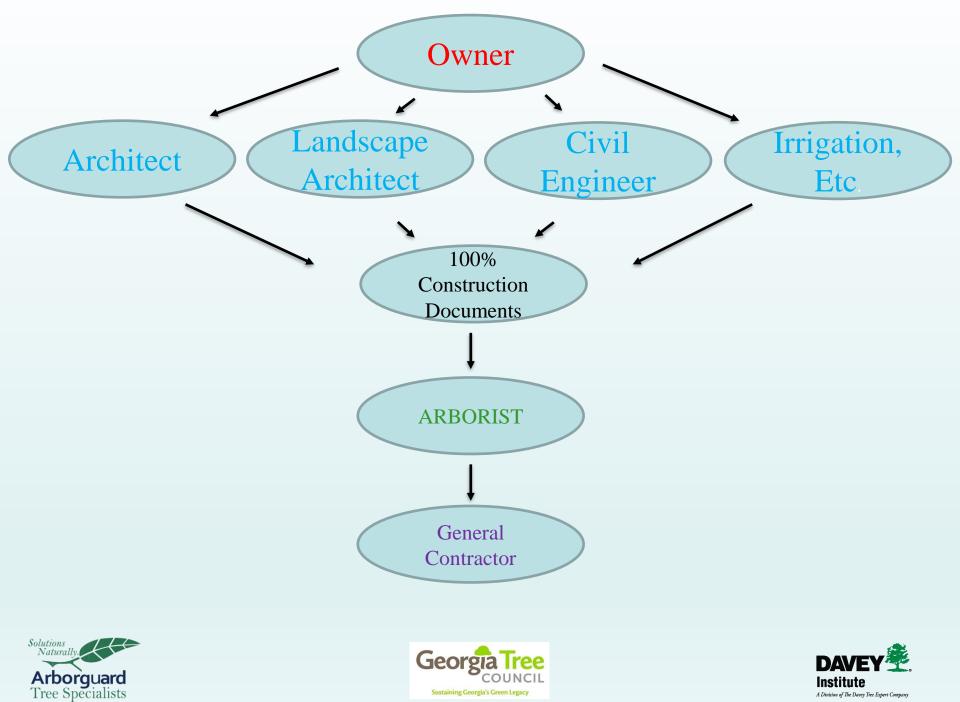
An evaluation committee convened by ABI will evaluate the submittals. At the discretion of ABI, follow-up interviews may be conducted before a final selection is made. The interview will focus on the proposal presentation, interpersonal skills, ability to organize data, and design vision.





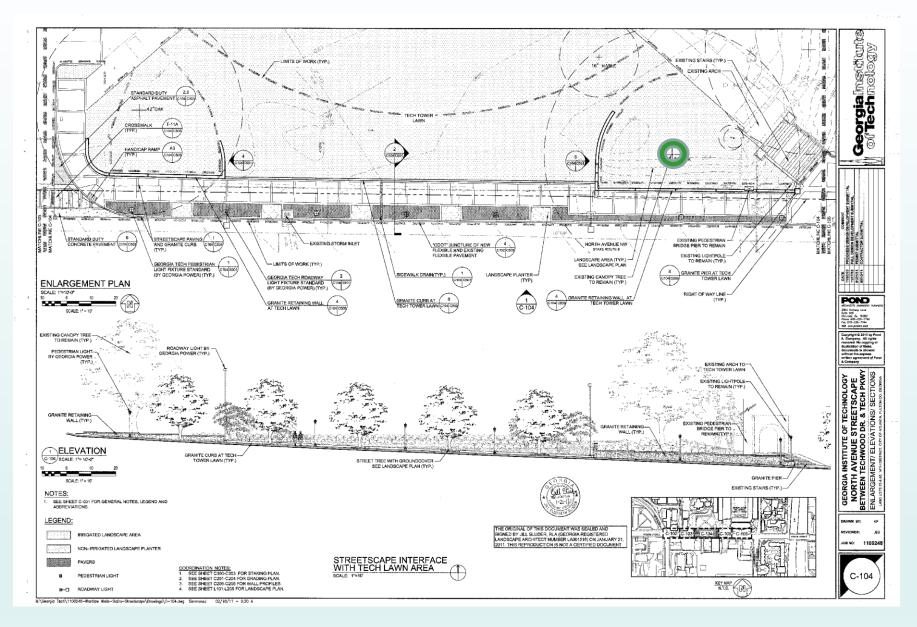
Courtesy of Atlanta Beltline, Inc.





Sustaining Georgia's Green Legacy

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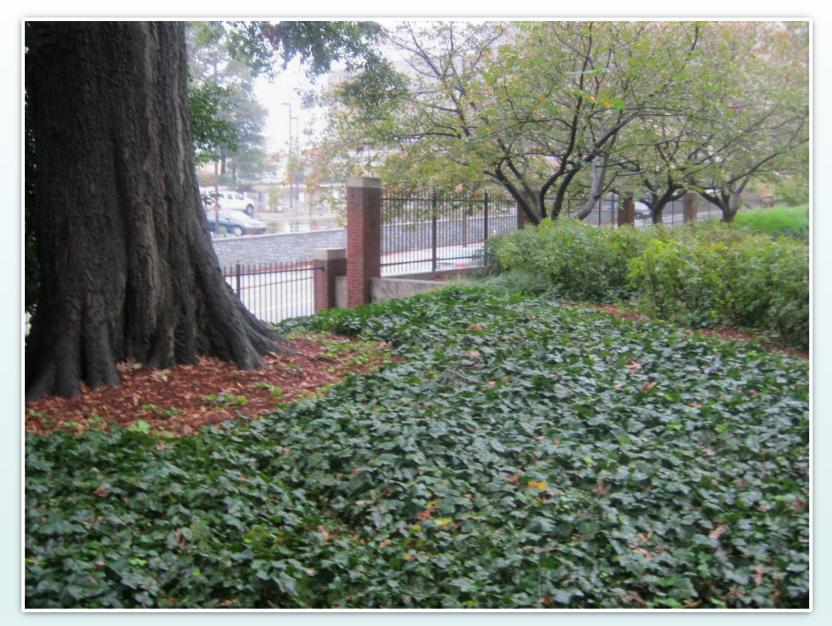






Plan Courtesy of POND & CO.









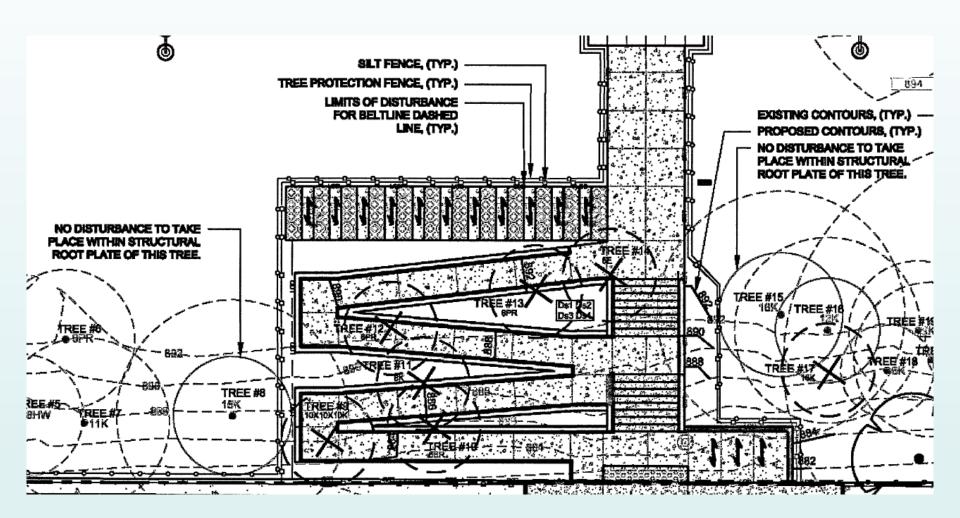










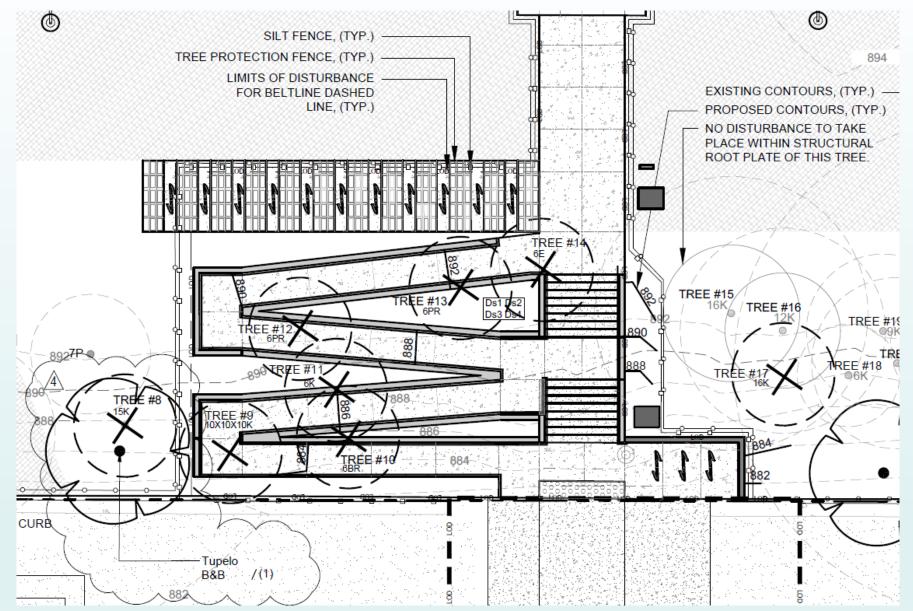






Plan Courtesy of ASD SKY









Plan Courtesy of ASD SKY



# We Need a <u>Non-Traditional</u> Approach to Site Design!







# SITES v2 Rating System

For Sustainable Land Design and Development



### Sustainable SITES

Initiative

### SITES GUIDING PRINCIPLES

These principles informed the development of specific and measurable criteria for site sustainability, and can also be applied to the land design and development process.

### Do no harm.

Make no changes to the site that will degrade the surrounding environment. Promote sustainable design projects on sites where previous disturbance or development presents an opportunity to regenerate ecosystem services through sustainable design.

### Apply the precautionary principle.

Be cautious in making decisions that could threaten human and environmental health. Some actions can cause irreversible damage. Examine a full range of alternatives (including no action), and be open to contributions from all potentially affected parties.

### Design with nature and culture.

Create and implement designs that are responsive to economic, environmental, and cultural conditions and to the local, regional, and global context.

### Use a decision-making hierarchy of preservation, conservation, and regeneration.

Maximize the benefit of ecosystem services by preserving existing environmental features, conserving resources in a sustainable manner, and regenerating lost or damaged ecosystem services.

### Provide regenerative systems as intergenerational equity.

Provide future generations with a sustainable environment supported by regenerative systems and endowed with regenerative resources.

### Support a living process.

Continuously re-evaluate assumptions and values, and adapt to demographic and environmental change.

### Use a systems thinking approach.

Understand and value the relationships in an ecosystem. Use an approach that reflects and sustains ecosystem services and re-establishes the integral and essential relationship between natural processes and human activity.

### Use a collaborative and ethical approach.

Encourage direct and open communication among colleagues, clients, manufacturers, and users to link long-term sustainability with ethical responsibility.

### Maintain integrity in leadership and research.

Implement transparent and participatory leadership; develop research with technical rigor; and communicate new findings in a clear, consistent, and timely manner.

### Foster environmental stewardship.

In all aspects of land development and management, foster an ethic of environmental stewardship—an understanding that responsible management of healthy ecosystems improves the quality of life for present and future generations.







The prerequisites are as follows:

Context P1.1: Limit development on farmland Context P1.2: Protect floodplain functions Context P1.3: Conserve aquatic ecosystems Context P1.4: Conserve habitats for threatened and endangered species

Pre-Design P2.1: Use an integrative design process Pre-Design P2.2: Conduct a pre-design site assessment Pre-Design P2.3: Designate and communicate Vegetation and Soil Protection Zones

Water P3.1: Manage precipitation on site Water P3.2: Reduce water use for landscape irrigation

Soil+Veg P4.1: Create and communicate a soil management plan Soil+Veg P4.2: Control and manage invasive plants Soil+Veg P4.3: Use appropriate plants

Materials P5.1: Eliminate the use of wood from threatened tree species

Construction P7.1: Communicate and verify sustainable construction practices Construction P7.2: Control and retain construction pollutants Construction P7.3: Restore soils disturbed during construction

O+M P8.1: Plan for sustainable site maintenance O+M P8.2: Provide for storage and collection of recyclables







Section 2: Pre-Design Assessment + Planning

### Prerequisite 2.1: Use an integrative design process

### Required

INTENT

### P2.1

Optimize site performance by identifying and executing synergistic opportunities across different disciplines throughout all phases of design and construction.

#### REQUIREMENTS

Projects must complete all of the following steps for prerequisite achievement:

#### 1. Form an integrated design team

- The integrated design team should include, at minimum, the following roles:
   Owner and/or client
  - Professionals knowledgeable in design, construction, and maintenance - Professionals knowledgeable in sustainable practices
  - Professionals with expertise in vegetation, water, soils, landscape ecology, materials, and human health and well-being, selected to meet the unique constraints and opportunities of the project and its site

#### 2. Develop a collaborative communication process

- Develop an agreed upon communication method for team members. The method should be collaborative and allow the viewpoints and perspectives of all members to be fully considered in the decision-making process.
- Designate a team facilitator to be responsible for overseeing and ensuring a collaborative communication process.
- 3. Identify project sustainability principles and performance goals (see O+M P8.1: Plan for sustainable site maintenance)
  - Identify the principles and performance goals of the project (both short- and longterm), Include an associated timeline and specific performance measures for each goal to determine when it has been achieved.
  - Designate specific team members to track project goals throughout the development process.

### 4. Incorporate the sustainability principles and performance goals into a program

- plan
- Develop a program plan that at minimum includes the following information:
  - The unique characteristics, opportunities, and constraints of the site
     General project parameters, such as the scope, budget, implementation schedule, purpose, and design intent of the project
  - A diagram or description of the intended function, arrangement, and
  - relationship of desired features and their approximate dimensions
- Describe how the sustainability principles and performance goals will be incorporated into the design.

#### 5. Identify stakeholders and site user groups

- · Identify project stakeholders.
- Identify the full range of potential site users. List the primary and secondary user groups.

SITES v2 Rating System

15







### 1. Form an integrated design team

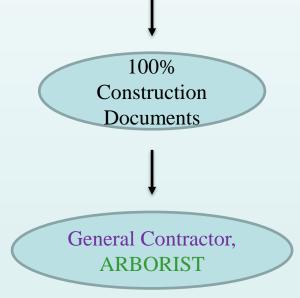
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  - Professionals with expertise in vegetation, water, soils, landscape ecology, materials, and human health and well-being, selected to meet the unique constraints and opportunities of the project and its site







Owner, Architect, Civile Engineer, Landscape Architect, Operations, Maintenance, Irrigation, Arborist, etc.









# Who is a Design Professional?

A <u>design professional</u> can be one of several different types of specialists:

- A licensed Architect
- A licensed Landscape Architect
- A registered Professional Engineer
- A licensed Land Surveyor





https://furukawacastles.com/



# The common theme with any professional trade is a strict adherence to the highest level of moral and ethical standards during the performance of a given task

If we maintain that design is not just a job, but a profession, like being an architect or a doctor or lawyer, <u>then we must also</u> accept the responsibilities and obligations that come with it.

Being a design professional is not merely a badge of acceptance. The title implies adherence to a code of professional behavior; it implies that we have obligations towards society and that there are lines that we are professionally bound not to cross.





https://www.theicod.org/



## How Do You Get a Seat at the Table?

It is critical that you gain the respect and trust of other design professionals:

- Credentials
  - ISA Certified Arborist
  - ISA Board Certified Master Arborist
  - ISA Municipal Arborist Specialist
  - Tree Risk Assessment Qualification (TRAQ)
  - SITES AP
  - ENV SP
- Education
- Experience
- Excellent Communication Skills
  - You must understand how to communicate effectively in the language of other trades:
    - Architect
    - Civil Engineer
    - Landscape Architect















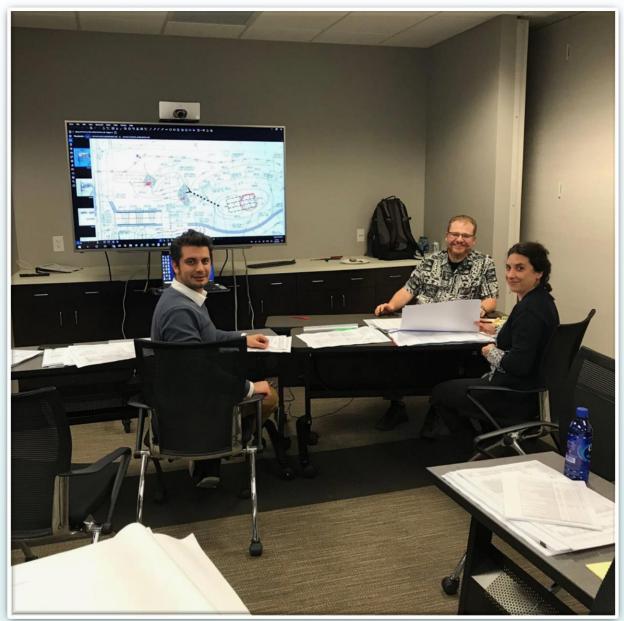


























### American Standard for Nursery Stock





cdn.ymaws.com/americanhort.site-ym.com/resource/collection/38ED7535-9C88-45E5-AF44-01C26838AD0C/ANSI\_Nursery\_Stock\_Standards\_AmericanHort\_2014.pdf







•→29-100¶

 $\circ \rightarrow A vailability \cdot of \cdot the \cdot trees \cdot in \cdot the \cdot Metro \cdot Atlanta \cdot area \cdot Questionable \P$ 

o→Water·Hickory¶

o→Bluff·Oak¶

 $\odot {\rightarrow} Southern {\cdot} Shagbark {\cdot} Hickory \P$ 

 $\circ \rightarrow \text{No} \cdot \text{Green} \cdot \text{Ash} \cdot \text{should} \cdot \text{be} \cdot \text{planted}, \cdot \text{Emerald} \cdot \text{Ash} \cdot \text{Borer} \cdot \text{is} \cdot \text{killing} \cdot \text{them}$  $\circ \rightarrow \text{Sand} \cdot \text{Post} \cdot \text{Oak}$ 

o→Carolina·Buckthorn¶

o→Persian·Ironwood¶

o→Post∙Oak¶

o→American·Bladdernut¶

o→Horse·Sugar¶

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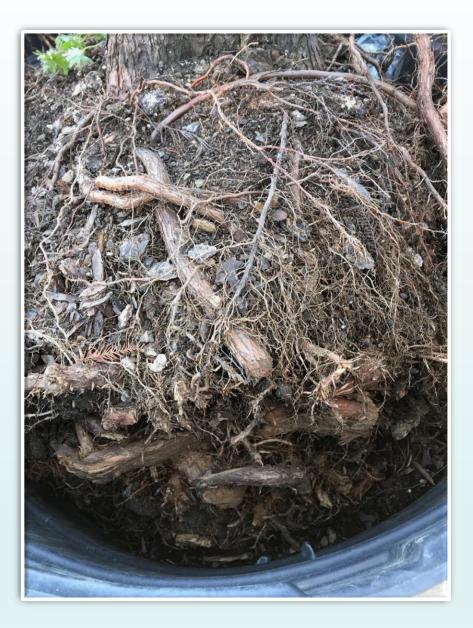
 $Since \cdot all \cdot trees \cdot shown \cdot are \cdot specified \cdot as \cdot container \cdot grown \cdot trees, \cdot all \cdot trees \cdot are \cdot to \cdot be \cdot inspected \cdot by \cdot an \cdot ISA \cdot certified \cdot arborist \rightarrow BEFORE \cdot the \cdot containers \cdot are \cdot to \cdot be \cdot removed \cdot from \cdot the \cdot shipping \cdot vehicle. \cdot NO \cdot EXCEPTIONS. \cdot \P$ 

 $\label{eq:ansatz} All \cdot \underline{container} \cdot grown \cdot trees \cdot shall \cdot meet \cdot the \cdot American \cdot Standard \cdot for \cdot Nursery \cdot Stock \cdot ANSI \cdot Z60.1 - 2004. \cdot \cdot As \cdot per \cdot Section \cdot 1.7 \cdot on \cdot page \cdot 20 \cdot of \cdot the \cdot document, \cdot all \cdot trees \cdot shall \cdot be \cdot free \cdot of \cdot excessive \cdot circling \cdot roots. \cdot \cdot Trees \cdot found \cdot with \cdot excessive \cdot irreparable \cdot girdling \cdot root \cdot conditions \cdot will \cdot be \cdot rejected \cdot before \cdot being \cdot off - loaded. \cdot \cdot NO \cdot EXCEPTIONS. \P$ 





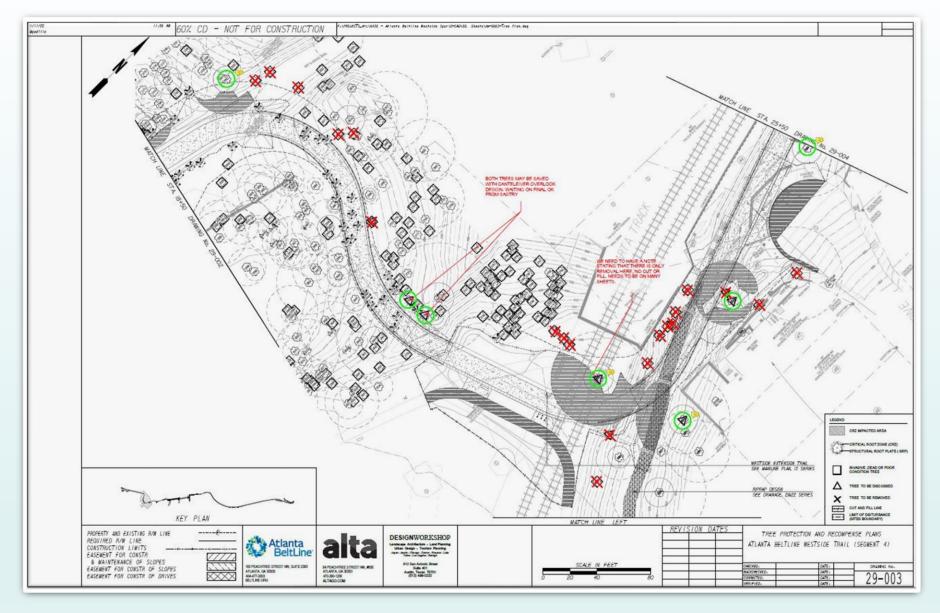








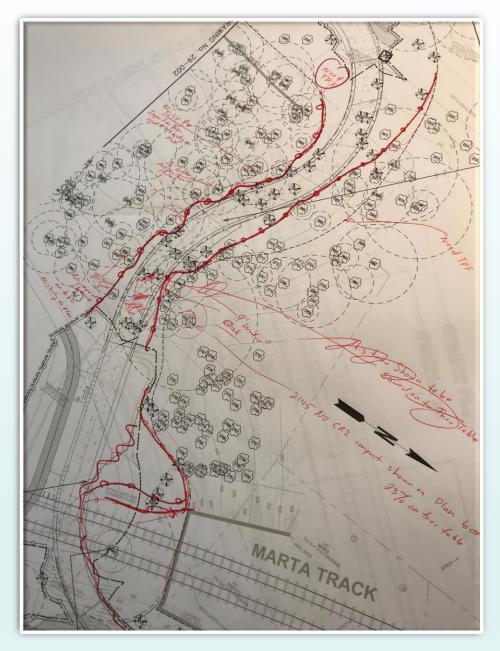






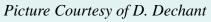




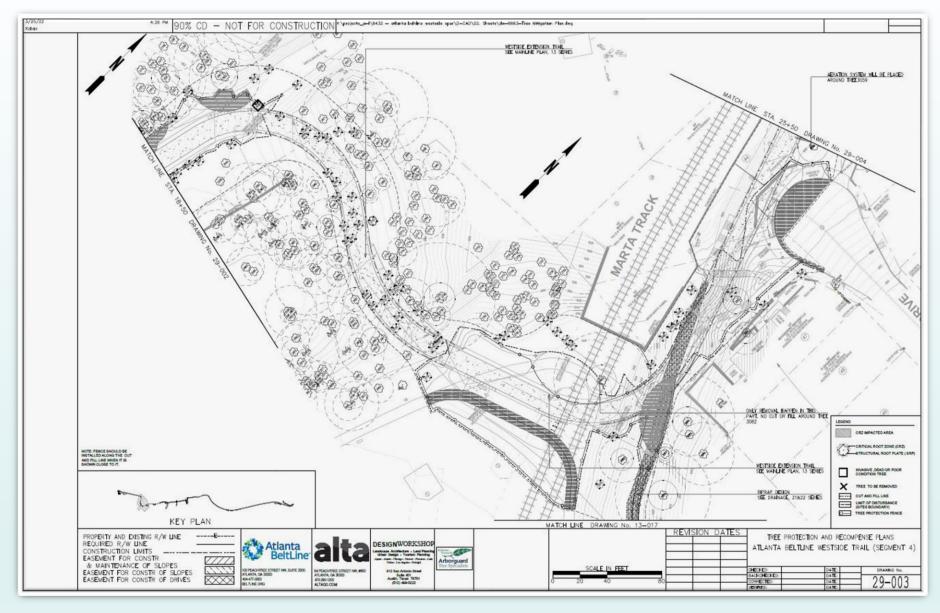








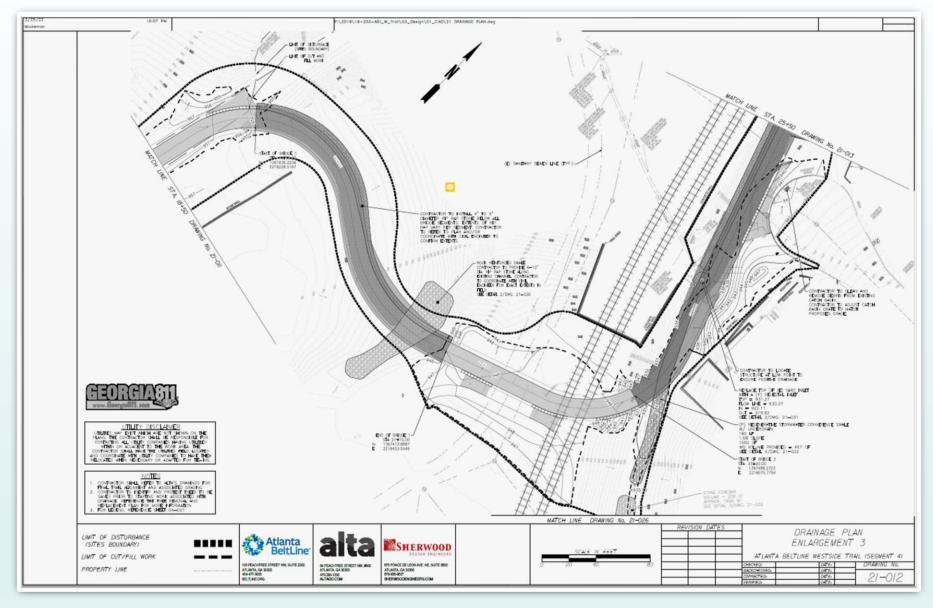


















o→Accuracy·is·critical·when·dealing·with·the·City·of·Atlanta·Parks· Department·plan·reviewers,·it·is·strongly·recommended·that· someone·on·this·team·go·thru·this·table·with·the·plan·and· <u>accurately·one-tree-at-a-time-mark-the-poor,·dead-and</u>· <u>invasive-trees·with-the-box·symbol·on-the-plan-and</u>· <u>correct-if-needed-any-deficiencies·on-the-tree-table,·no-</u> <u>exceptions-to-this·will·be-acceptable-anywhere·on-the-29-</u> <u>plan-series.</u>¶

### 1

General·note: every·sheet·in·this·series·has·significant·inconsistency· regarding·the·symbol·for·poor,·dead·and·invasive·trees.··Some·trees·have· the·symbol·while·most·trees·that·should·have·the·symbol·do·not.··<u>It·is·</u> <u>critically·important·that·this·symbol·be·shown·on·all·trees·in·the·29-</u> <u>Series·that·require·this·symbol,·whether·they·are·being·removed·or</u>· not.¶

### • → 001,¶

- o→remove·"X".from.tree.#301.¶
- o→NOTE: Tree # ·1906 ·& ·1907 ·will ·be ·removed ·and ·relocated ·onsite, ·to ·read · ``will ·be ·relocated ·on -site, ·remove · ``X" ·from ·both trees · use ·a · unique · designation ·for ·relocated ·trees . · ·I · never identified · on ·the ·planting ·plan · where ·these ·trees ·are ·to ·be located ·to ¶
- → 002,¶
  - o→No·tree·impact·shown·to·CRZ's·within·the·bioswale/riprap·area¶
    o→#2004·shown·in·a·bioswale,·should·it·be·removed?¶
  - o→Multiple·trees·require·the·DDH·symbol¶
- •→003,¶
  - o→#2640·has·trees·being·removed·immediately·adjacent·to·it,·need· a·note·stating·"Tree·removal·shall·not·damage·adjacent·trees·to· be·saved"¶
  - o → #2745·shown·to·have·a·23%·impact·in·the·table,·but·no·shaded· CRZ·or·impact·shown·on·the·plan¶
  - o→#3078·shows·riprap·thru·a·large·portion·of·the·CRZ·with·a·5%· impact·shown·in·the·table·and·no·root·zone·impact·shown·on·the· plan.··Please·refer·to·the·details·pages·in·the·21·series·set·to·see· how·this·riprap·area·is·going·to·be·constructed·and·revise·the· tree·impact·accordingly¶
  - o→No·tree·protection·fence·shown·adjacent·to·Bridge·1,·there·will· be·tree·removal·and·riprap·installation·under·the·bridge·that·will· impact·the·CRZ's·of·adjacent·protected·trees.·SRP's·are·to·be· protected·on·both·sides·of·the·bridge,·see·attached·jpg·of· marked·up·site·plan¶
  - o→Multiple·trees·require·the·DDH·symbol¶

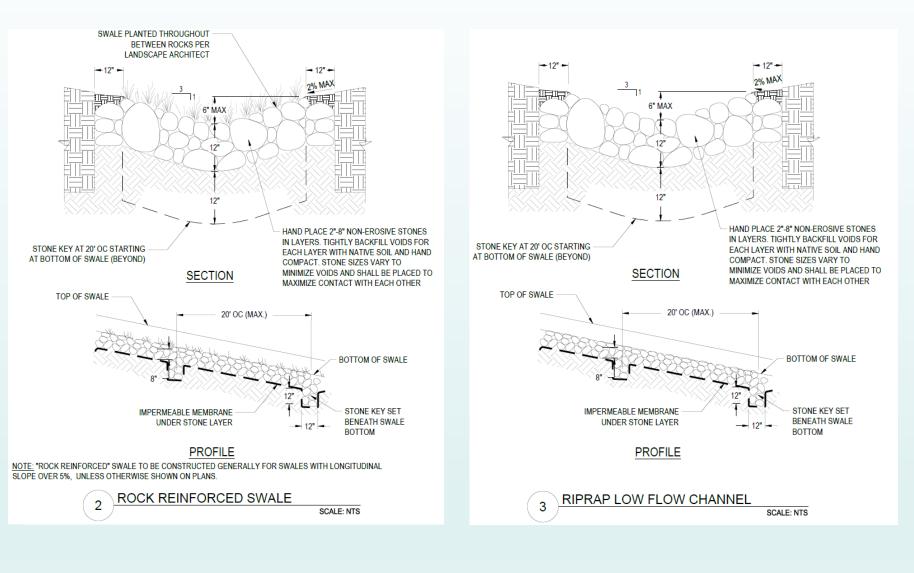
### • → 004,¶

 $\circ \rightarrow @\cdot #3031, \cdot TPF \cdot encroaches \cdot into \cdot riprap \cdot feature \cdot (?)$  $\circ \rightarrow No \cdot TPF \cdot @\cdot #3057, \cdot should \cdot at \cdot least \cdot follow \cdot the \cdot LOD$ 





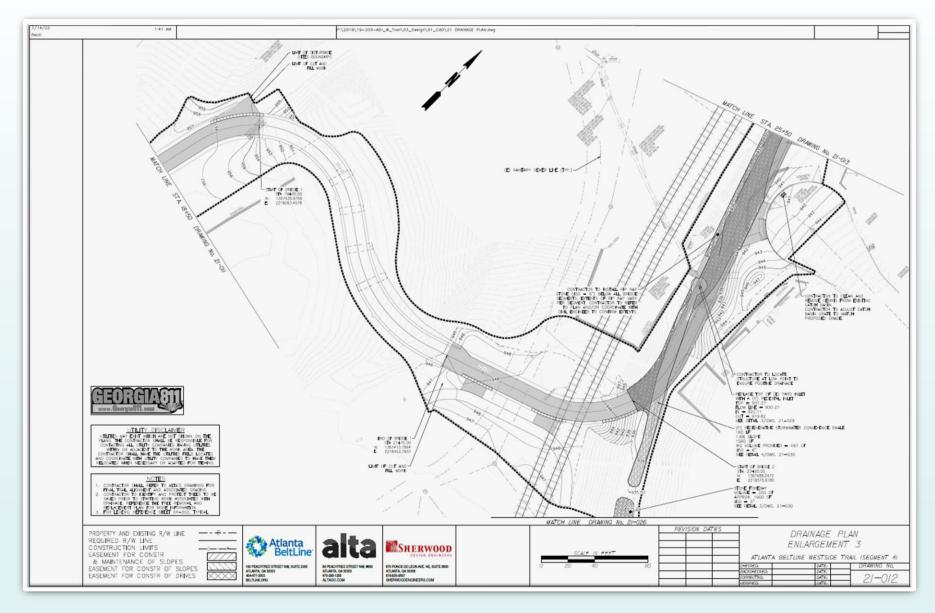








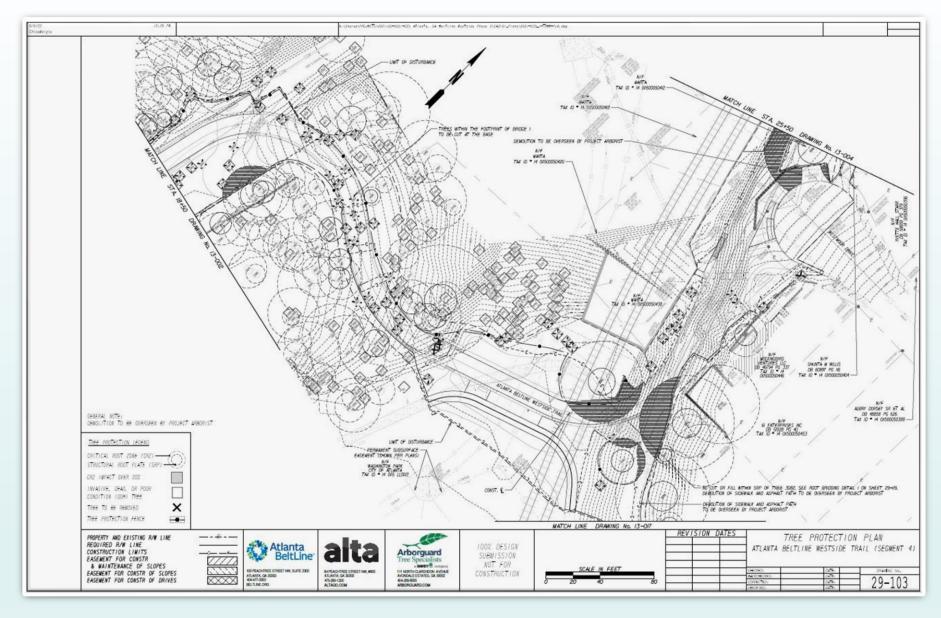








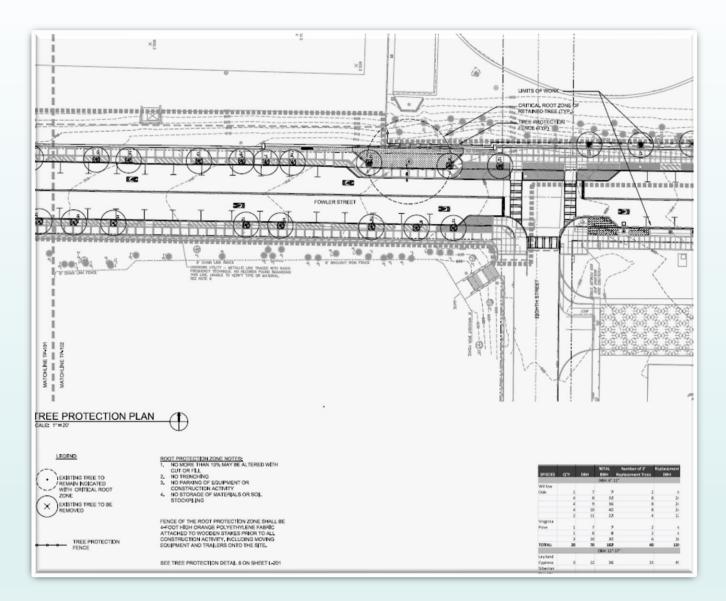










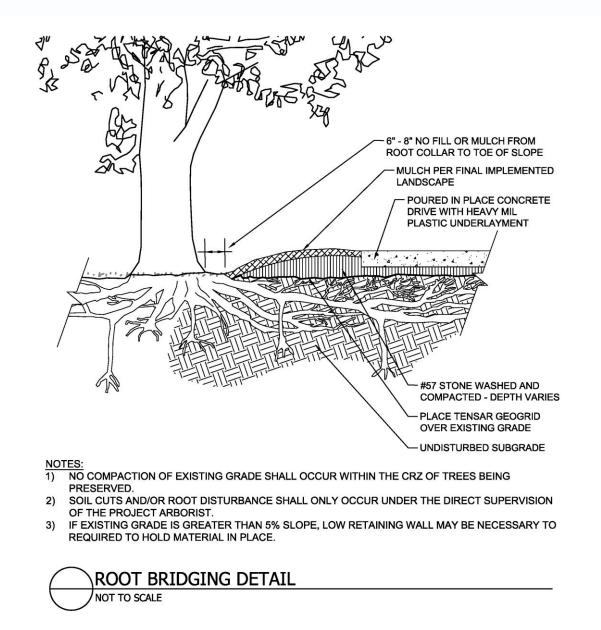






Plan Courtesy of POND & CO.

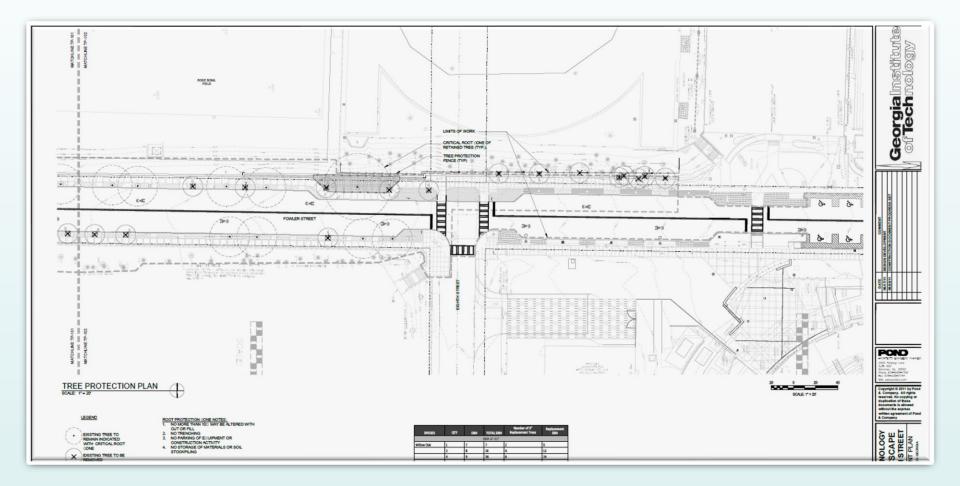
















Plan Courtesy of POND & CO.

















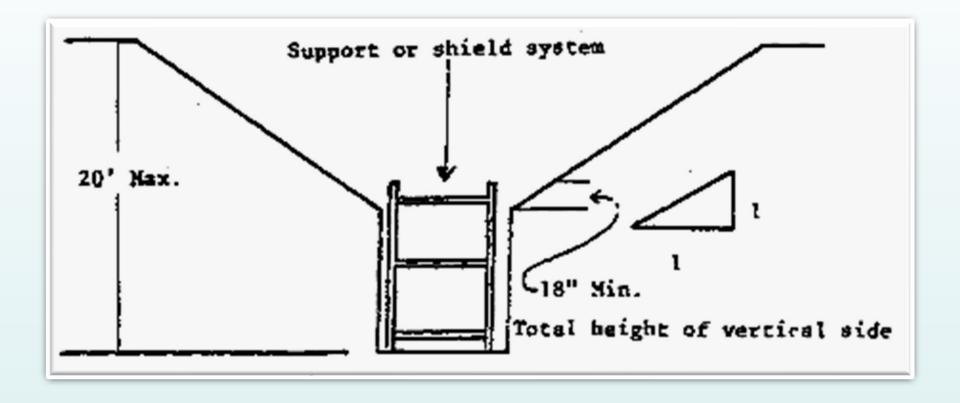










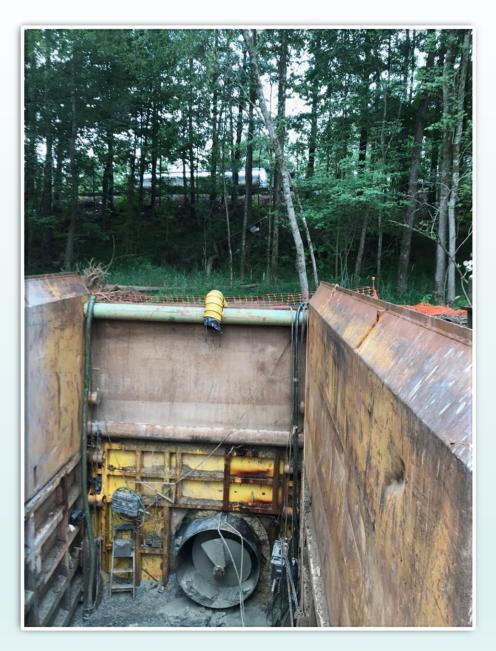


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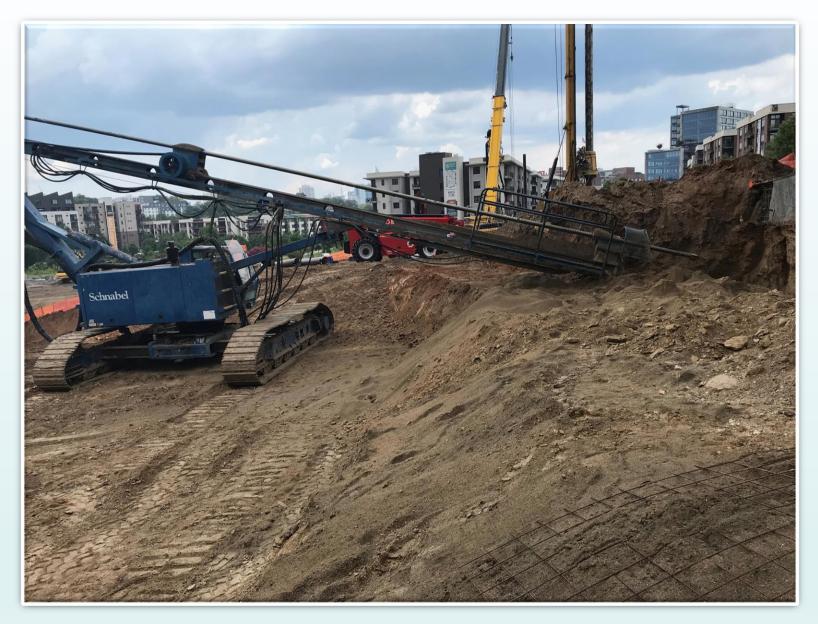
























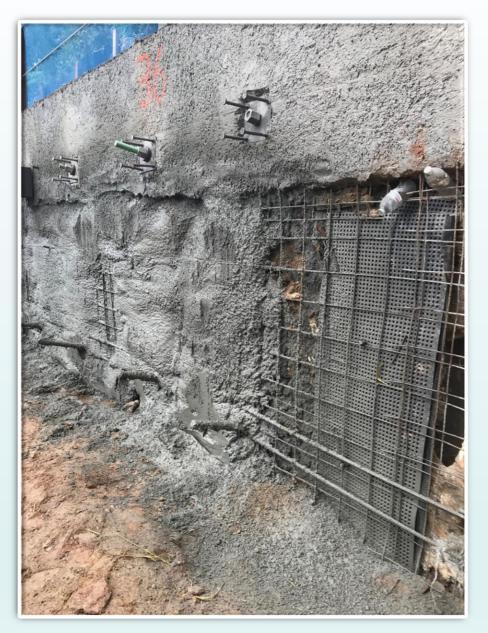










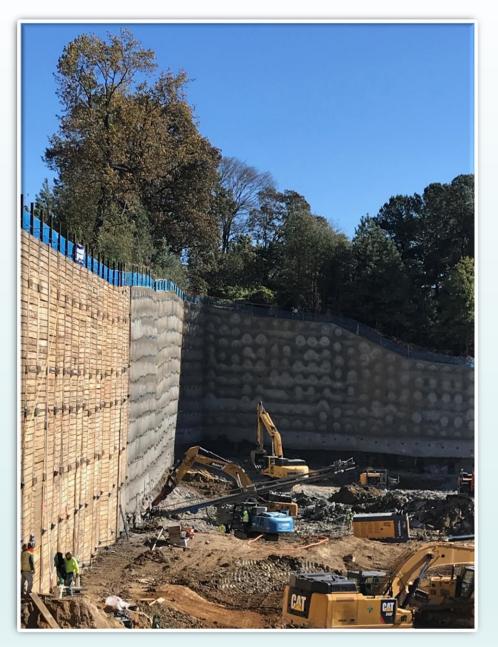


















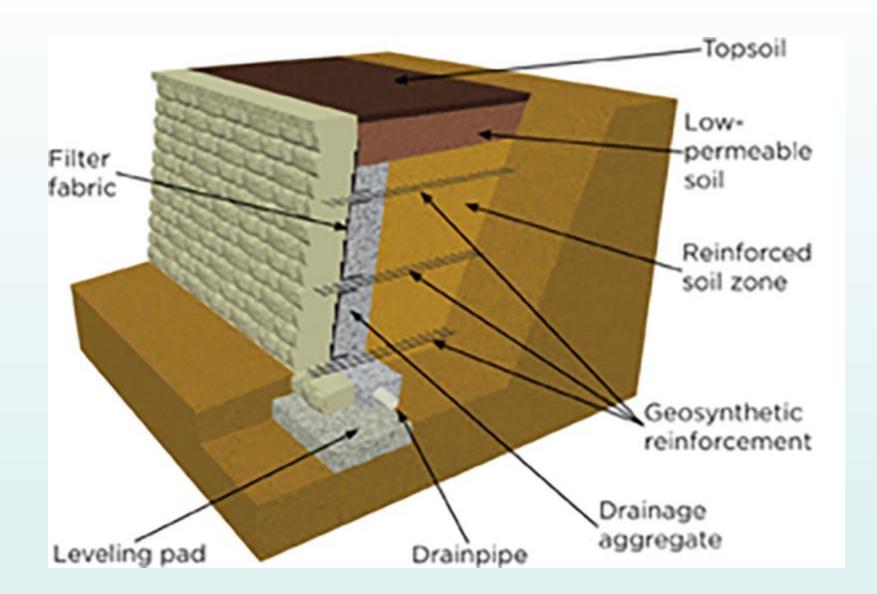


Diagram courtesy of anchor diamond





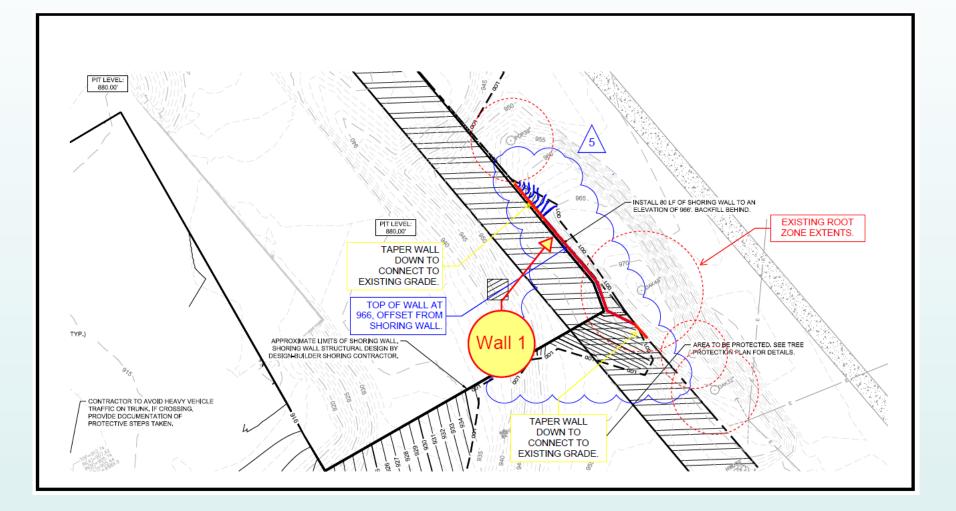
















**Diagram Courtesy of Brasfield & Gorrie** 



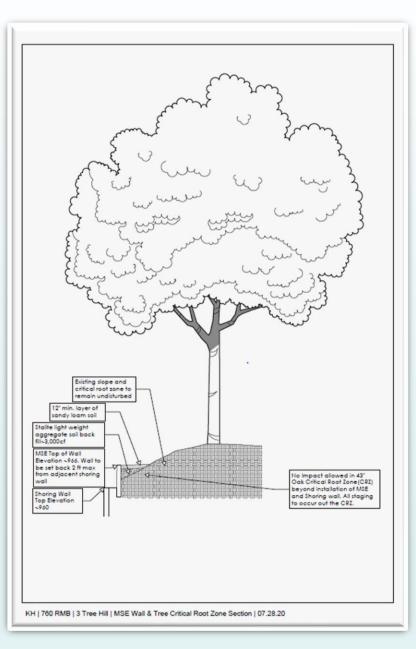
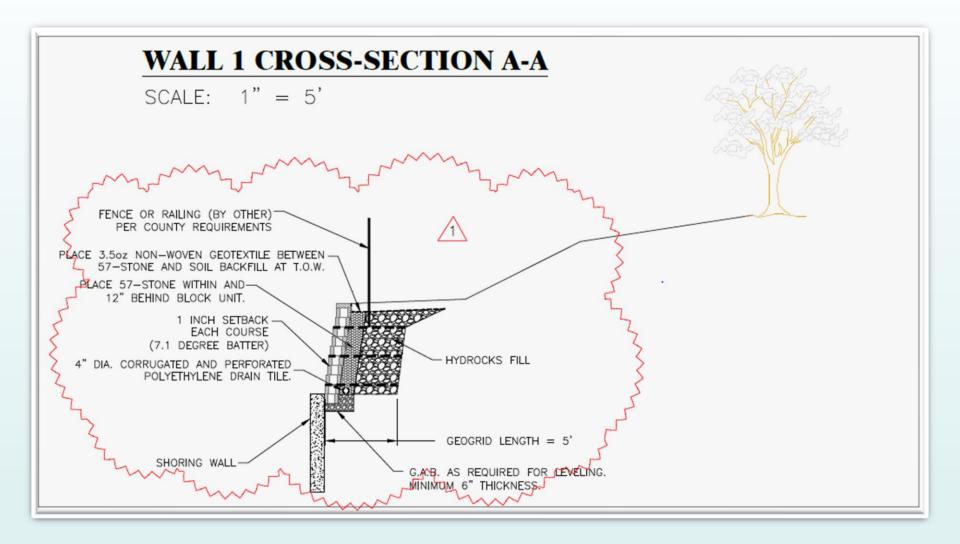






Diagram Courtesy of Kimley-Horn









**Diagram Courtesy of Schnabel** 

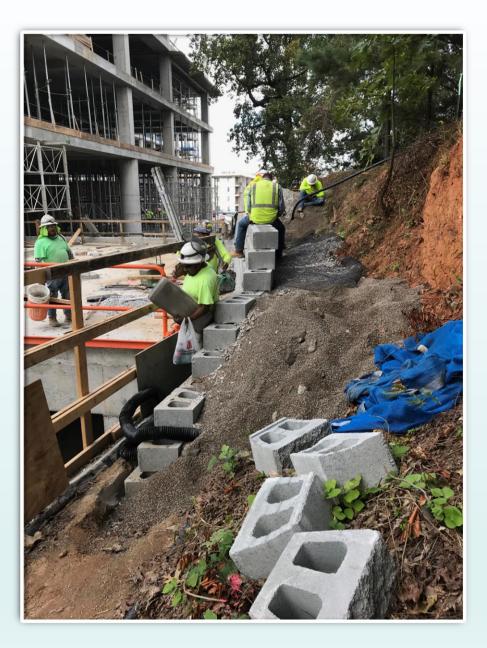


























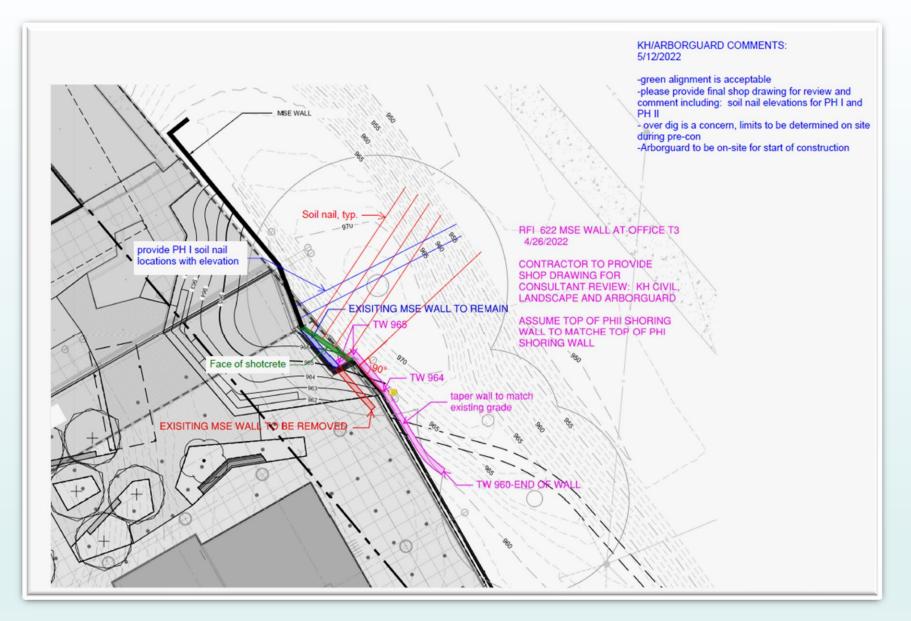






Diagram Courtesy of Brasfield & Gorrie



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