

Tennessee Tree Line USA Handbook



TENNESSEE DEPARTMENT OF AGRICULTURE

DIVISION OF FORESTRY



Urban Forest Resource Management



State Forest Management



Forest Data & Technology



Forest Resource Protection



Environmental Affairs & Public Outreach



Forest Resource Management



Reforestation



Forest Businesses

Cover Photo

City of Chattanooga, Department of Public Works
Urban Forestry crew performing municipal tree
trimming operation. *(photo credit: Gene Hyde)*



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TABLE OF CONTENTS

INTRODUCTION	4
COMPLIANCE STANDARDS	5
REQUIREMENT 1. QUALITY TREE CARE	5
REQUIREMENT 2. ANNUAL WORKER TRAINING	8
REQUIREMENT 3. COMMUNITY TREE PLANTING & PUBLIC EDUCATION	9
REQUIREMENT 4. TREE-BASED ENERGY CONSERVATION PROGRAM	12
REQUIREMENT 5. ARBOR DAY OBSERVANCE	13
APPENDIX A: UTILITY IVM WORKSHEET	15
APPENDIX B: UTILITY CREW EVALUATIONS	17
APPENDIX C: TREE LINE USA MATERIALS	19

FACT SHEETS:

PLANT TREES TO CONSERVE ENERGY

PLANT THE RIGHT TREE IN THE RIGHT PLACE

DON'T TOP TREES!

STORMS, TREE AND UTILITY LINES

TREES AND UNDERGROUND UTILITY LINES

TREE LINE USA STANDARDS

TREE LINE USA APPLICATION



INTRODUCTION

The national Tree Line USA program is a utility award presented by the Arbor Day Foundation and the National Association of State Foresters. The award recognizes utilities that contribute to their local urban forestry communities by following five standards:

- complying with the ANSI A-300 standards for tree pruning & maintaining a system of quality tree care,
- providing annual worker training,
- maintaining an effect community tree planting & public education program,
- adopting a tree-based energy conservation program, and
- promoting Arbor Day in their local communities.

Utilities that receive the Tree Line USA award are recognized nationally in the Wall Street Journal and locally through area events.

As of 2010, the Arbor Day Foundation recognizes new standards for the Tree Line USA program that differ from previous years. Each utility desiring Tree Line USA designation should become familiar with these new standards. While there are some additional requirements to the new program, most of the changes pertain to documentation of existing requirements.

This handbook is designed to help Tennessee utilities comply with the new standards of the Tree Line USA program, as interpreted by the Tennessee Department of Agriculture, Division of Forestry. This agency is ultimately responsible for verifying compliance with the standards for utilities within this state.

Appendices of this handbook contain several sample forms that may provide help in documenting the standards of the program.

Tennessee Division of Forest Urban Forestry Contacts

Bruce Webster

Urban Forestry Unit Leader (Nashville)

615-837-5436

bruce.webster@tn.gov

Brian Rucker

Urban Forestry Program Specialist (Nashville)

615-837-5439

brian.rucker@tn.gov

Tom Simpson

Regional Urban Forester (East)

865-908-4434

tom.simpson@tn.gov

Shawn Posey

Regional Urban Forester (West)

901-754-5185

shawn.posey@tn.gov

Several examples of clip art are also included for convenient use by utilities for educational purposes. Additionally, the Tree Line standards and the Tree Line application sheets are included as helpful references.

Due to the nature of some of the standards, there may be additional questions that this handbook does not adequately answer. Please contact any of the Division of Forestry Urban Foresters for further information.



COMPLIANCE STANDARDS

REQUIREMENT 1. QUALITY TREE CARE

A. Utility Pruning

Trimming practices involving the use of ANSI A-300 pruning standards are necessary. Each utility should have a copy of the ISA Utility Pruning Best Management Practices (Part 1) available in their office. Each contractor and/or utility crew that is responsible for trimming on the system should have a copy available of either: Pruning Trees Near Utility Lines by Dr. Alex Shigo or ISA's Utility Pruning Best Management Practices, or other suitable substitute reference material approved by the TN Division of Forestry.

Additionally, each utility should provide evidence of their policies and procedures that are in compliance with the ANSI A-300 pruning standards. This can be an official utility document (i.e. Board of Director's document) or a copy of the contractor specifications.

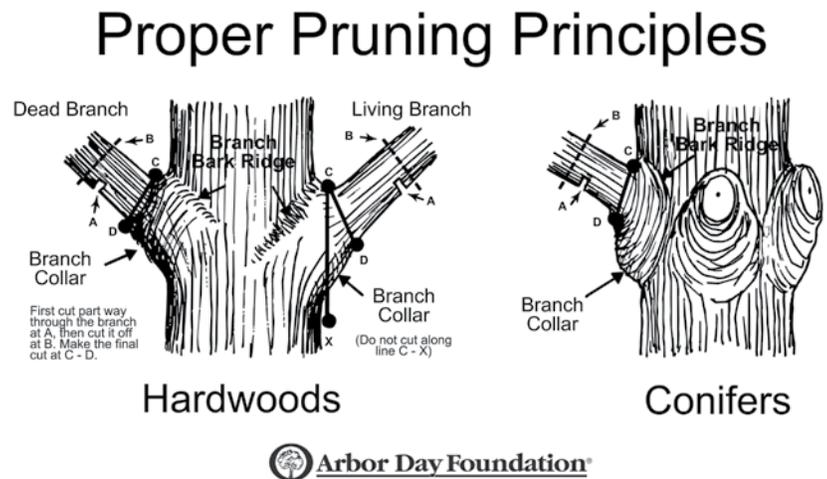
Documentation: Attach a copy of company policies and procedures document and indicate number of booklets used (i.e. 20 of Shigo booklets).

B. Integrated Vegetation Management (IVM)

Most Tree Line utilities incorporate some form of IVM on their respective systems. Many utilities implement various herbicide, mowing and cultural practices that afford them the best combined measure of right-of-way vegetation management. Some utilities also utilize mechanical pruning, such as the use of specialized machinery. **For the purposes of Tree Line USA, all trimming, mowing, and spraying crews (manual or mechanized) are considered IVM crews.**

This standard requires that the utility will be familiar with the ISA IVM Best Management Practices booklet (or substitute). Each utility's main office should have a copy of the booklet and each supervisor that evaluates and/or plans for IVM crew work should be familiar with those best management practices. If the utility has a set of cautionary provisions for herbicide, cutting, or mowing practices around sensitive areas already written into their specifications, such reference should be provided with the application. The TN Division of Forestry has developed a form to document utility IVM work (see Appendix A.). This form should be completed and enclosed with the Tree Line application.

Documentation: Complete and enclose the TN Utility IVM Worksheet (Appendix A).





COMPLIANCE STANDARDS

C. Underground Utility Construction

It is recognized that not all utilities provide underground construction services and that outside contractors, without any control by the utility, are often responsible for digging the trenches to the appropriate point of service contact. The standard assumes that utilities do have control of all underground construction and that the utility will take measures to protect tree roots when such is incorporated. **Documentation of that company policy would be helpful.**



However, where utilities do not provide underground construction, Tennessee has always requested the utility to provide some educational information to the contractors at the point of permit to perform the work, as in the case of providing Dr. James Fazio's *Trenching and Tunneling Near Trees: A Field Guide for Qualified Workers* to the city agency that permits the practice. Where a utility does provide underground construction, then the standard requires the booklets (or suitable substitute) to be provided to the crews that perform that work. Where training has actually been provided to underground construction crews, the documentation of that and the material used in that training would be sufficient.

Documentation: Resources utilized (i.e. 20 of Fazio's booklets provided to the city Codes Enforcement office), **or** 4 booklets were provided to contractor crews, **or** training to the underground construction crews was performed on _____ and the material utilized was _____.

D. Compliance

The standard seeks to document that the utility's right-of-way program is complying with all applicable Federal, state, and local statutes, regulations and ordinances. Occasionally a local city tree protection ordinance will specifically mention the utility and its operation. However, most ordinances exempt the utility from complying with a city ordinance. Current existing state laws generally refer to pesticide use and the licensing of the operators.

Documentation: Name of person in charge of verifying compliance with all laws. This could be the one in charge of all right-of-way vegetation, or a manager.

E. Quality Assurance

Most utilities have some form of accountability for the money spent in tree trimming and IVM work, such as regular field checks of crews, systematic evaluations, or other methods to assure that the work is being performed according to the utility policies. This evaluation can be simple or complex, depending upon the measures desired and the objectives of the utility. Many utilities already have a specific form available for this and involve regular crew inspections and evaluations. In this case, a copy of that form should be included with the application. A very simple evaluation form is included in the Appendix B just as an example. Where a form is not



COMPLIANCE STANDARDS

used, but some method of regular inspection or auditing is performed, a statement of that process will be necessary.

Documentation: Provide evidence of inspection form or auditing method and state how often it is utilized, or state when field checks are accomplished. In all cases provide the name of the person that performs the inspections/auditing (i.e. “field checks are accomplished on each crew three times a week to verify that they are following contract specifications, or, audits are performed at the end of unit completions. Inspections/audits were made by _____”).

F. **Impact on the Urban Forest and Community Trees**

This standard seeks to document that the utility is working with other groups/professionals/cities to provide a measure of networking to enhance the utility’s programs. If the utility has an employee on a local tree board, or other working committee, then this would provide evidence of this networking (the Division of Forestry encourages all utilities to designate a representative to serve on a local tree board or advisory committee, if there is one). An employee that is a member of the TN Urban Forestry Council or chapter of that group would also provide this. Membership with organizations outside the state would not qualify. Where the utility has no member on any listed board or group, their work with a local school or other tree planting opportunity should be listed (including Arbor Day ceremonies at individual schools). A tree planting activity at a school should be separate from the Arbor Day ceremony in requirement #5, but may also be listed where there is no opportunity for a separate ceremony (i.e. there is no Tree City within the utility’s service area and the utility must go to a school to host an Arbor Day ceremony). Any work with an outside entity or group can also be listed, so long as it pertains to the utility’s work with trees or urban forestry.

Documentation: List of active groups that utility participates in, or tree planting ceremony at a school or other activity (i.e. utility forester is a member of the ____tree board)



COMPLIANCE STANDARDS

REQUIREMENT 2. ANNUAL WORKER TRAINING

A. Annual Training

Annual training of all right-of-way crews must be accomplished. Training must include ANSI A-300 standards (requirement 1a) for all tree trimming crews and IVM Best Management Practices for those crews dedicated to IVM (requirement 1b), including herbicide crews, mowing crews, etc.. The date of the training and the topics must be provided for documentation. Safety training will not count for this standard.

Additionally, safe work practices training, involving AZSI Z133.1 must be included for all crews. In many cases, the contractor is responsible for safety training of their crews and the company should furnish the utility the dates of training, topics covered, and list of attendees. The utility will be responsible for verifying that all appropriate training was performed, but the training may be accomplished by contractors.

Documentation: Include dates, list of attendees, and topics covered for ANSI-A-300 standard. Include dates, list of attendees, and topics covered for safety training and the Z133.1 standard.

B. Utility Training Assurance

This standard documents that all the training in 2(a) occurred and was appropriate.

Documentation: Name of utility person responsible for verifying all training in 2(a) and name & title of person(s) responsible for the training itself (if different).





COMPLIANCE STANDARDS

REQUIREMENT 3. COMMUNITY TREE PLANTING & PUBLIC EDUCATION

Most utilities develop tree replacement programs to promote appropriate tree species under or near power lines to reduce future trimming expenses. The education of their customers about these programs usually involves some form of public education and can take many forms, including bill-stuffers, newspaper articles, utility inserts, or web sites. Many utilities will also notify customers before trimming is scheduled, either within their monthly bills or by doorknockers, in order to promote their programs and educate the public on their trimming procedures.

This standard seeks to document those utility programs and public educational procedures. Each standard has several options that qualify. The utility may choose which option works best for their particular circumstances.

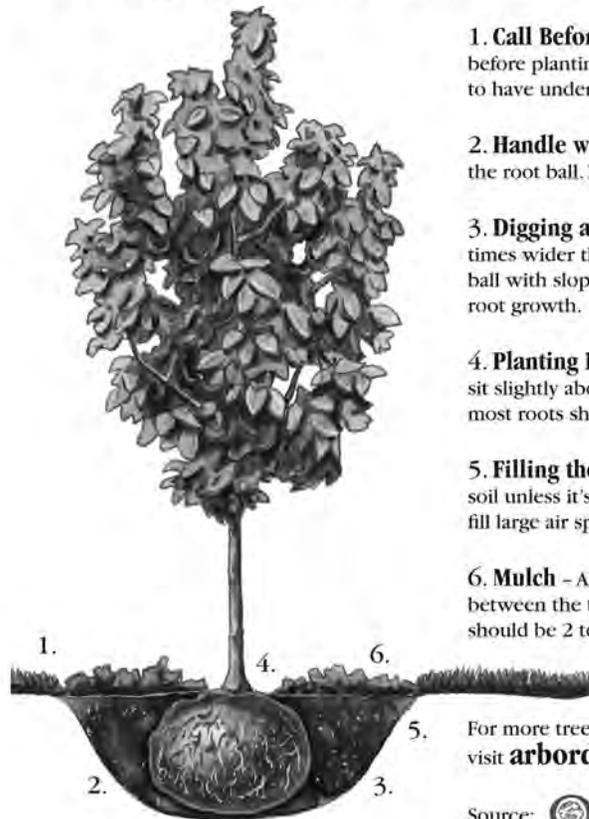
Note: The utility *must* now spend 10 cents per customer on community tree planting, public education and/or tree-based energy conservation programs. Expenditures may be spread among these three programs, but activity must be documented in each of the requirements (3a, 3b, and 4).

A. Annual Expenditure for Tree Planting

Option 1: Money spent on tree replacement program or money spent on contribution to local tree planting effort, such as a city tree planting program.

Option 2: Money spent on an energy savings program to businesses that involves the planting of trees.

Six things you should know when planting a tree.



1. Call Before You Dig - Several days before planting, call the national 811 hotline to have underground utilities located.

2. Handle with Care - Always lift tree by the root ball. Keep roots moist until planting.

3. Digging a Proper Hole - Dig 2 to 5 times wider than the diameter of the root ball with sloping sides to allow for proper root growth.

4. Planting Depth - The trunk flare should sit slightly above ground level and the top-most roots should be buried 1 to 2 inches.

5. Filling the Hole - Backfill with native soil unless it's all clay. Tamp in soil gently to fill large air spaces.

6. Mulch - Allow 1 to 2 inch clearance between the trunk and the mulch. Mulch should be 2 to 3 inches deep.

For more tree-planting tips and information, visit arborday.org.

Source:  **Arbor Day Foundation**
90075201



COMPLIANCE STANDARDS

Option 3: Money spent on a “Right Tree-Right Place” demonstration area. All related expenses to establish and maintain such an area qualify.

Option 4: Money spent on specific tree planting programs to offset the utility’s carbon footprint, or enhance storm water management, or improve air/water quality. The program must include the planting of trees but may be specifically for any of the reasons given.

Any of the above four options may be chosen to meet the standard, but activity must be documented in at least one of them. The expenditures for any of these options may be added to another option in requirement 3 (a), 3(b) and/or with requirement 4. The total money, then, of requirement 3 and 4 must meet the expenditure need of 10 cents per customer. A tree planting program of sufficient amount to meet the total expenditure requirement may be used but activity must also be documented in requirement 3 (b) and requirement 4, whether any money is spent or not.

Documentation: Photos, newspaper articles, handouts, brochures, or sample material for tree planting program/events. Where a tree replacement program is utilized, please include number of trees replaced under this program for the year, species chosen and total amount spent on the program

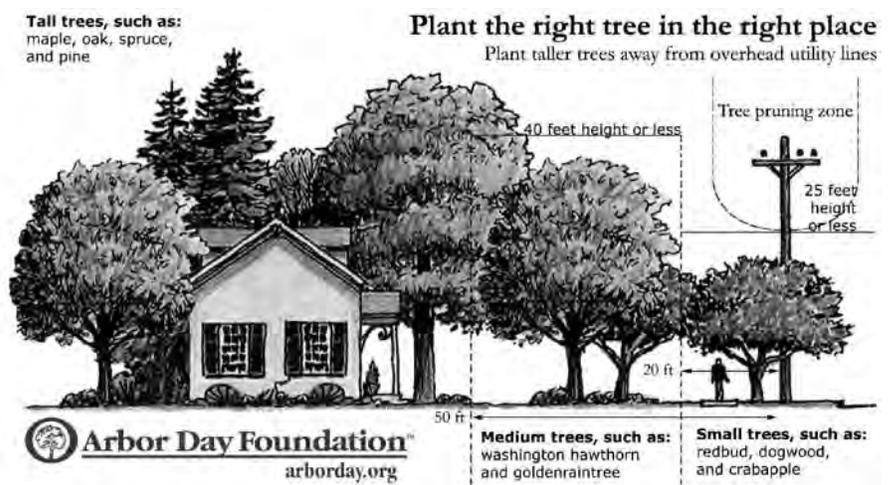
B. Annual Educational Program

Public education communication is an annual necessity. There are seven options that will meet this standard. A utility may implement more than one option but must show activity in at least one of these options. This information may be through bill-stuffers, inserts, newspaper articles, handouts, brochures, or web sites. The insert in state utility magazines (i.e. *Tennessee Connections* for municipal utilities and *Tennessee Magazine* for cooperatives) also allows the utility to make direct contact with each of their customers.

Option 1: Some form of public information regarding tree-related hazards. ISA, The Arbor Day Foundation and the *Trees for Tennessee Landscapes/Selection and Care* by the UT Agriculture Extension Service all provide good reference material for use.

Option 2: Tips on how to prune trees safely

Option 3: Information on the Right Tree-Right





COMPLIANCE STANDARDS

Place selection, including appropriate site selection. A tree replacement brochure would qualify for this.

Option 4: Education regarding trees, power lines (safety) and the danger of wildfire. The Tennessee Division of Forestry has educational material on wildfire dangers. Safety information on the dangers of electric/gas lines can be used from various sources.

Option 5: Information on the IVM program of the utility, either printed or on Web site.

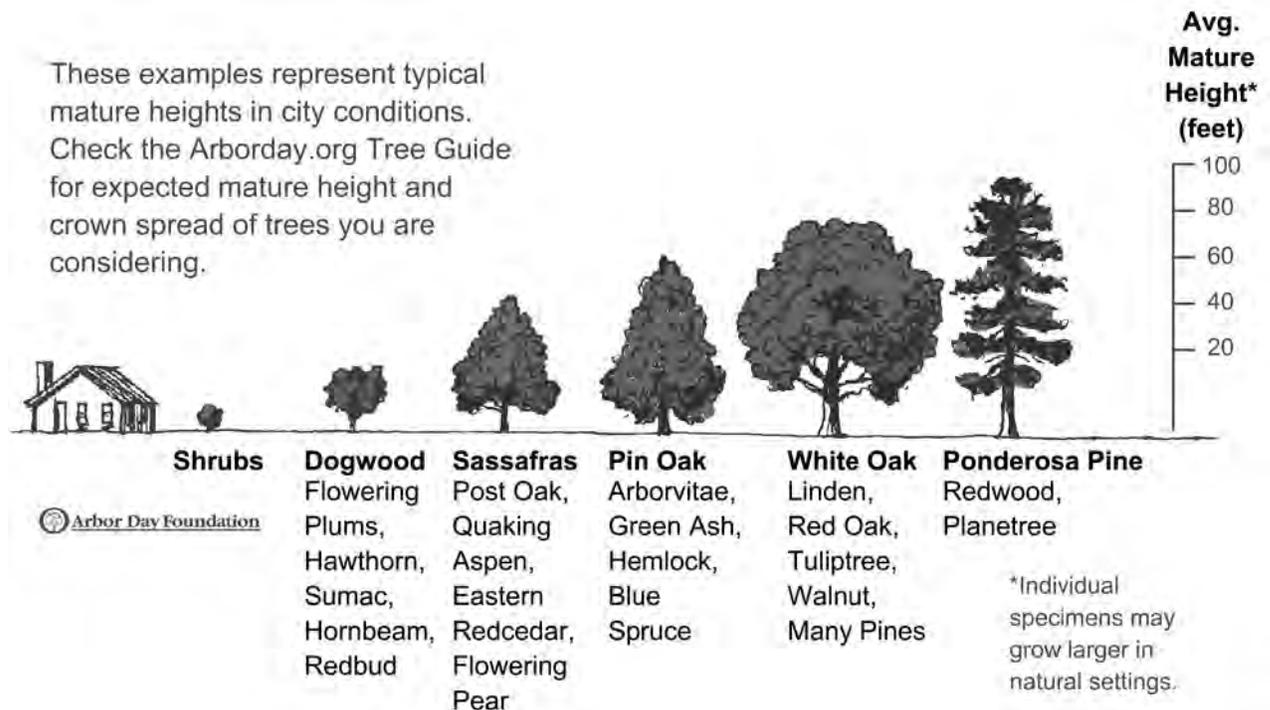
Option 6: Tree/utility safety programs to school groups.

Option 7: Recruitment and/or support of Tree City USA communities within the service area. Meetings with city officials for this purpose would need to be documented.

The educational material must be distributed on an annual basis, or be available on an annual basis. See Appendix C for sample sources of public clip art for use in utility bill mail outs. Public Service Announcements, logos, illustrations, and other educational material suitable for print and electronic media (as seen throughout this handbook) can be found at the Arbor Day Foundation's media webpage:

<http://www.arborday.org/media/>

Documentation: Evidence indicating method chosen and utilized, copy of printed material, or summary of events/programs.





COMPLIANCE STANDARDS

REQUIREMENT 4. TREE-BASED ENERGY CONSERVATION PROGRAM

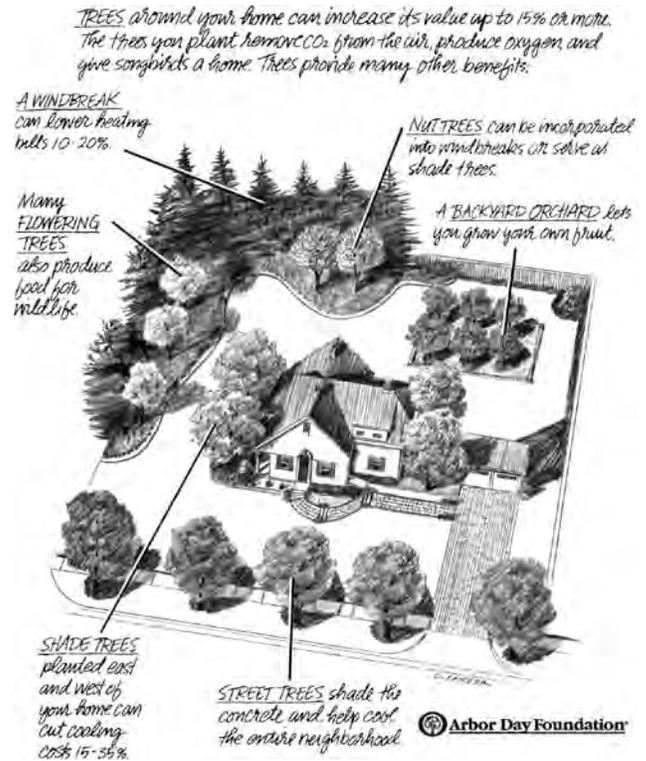
This is a new standard, and requires the utility to document some form of an energy conservation program involving trees. While this could be as complex as developing and sponsoring a program with businesses or other groups, it could also be as simple as featuring energy conservation with trees on a web site. The expenses on this requirement may be added with any of those of requirement 3 to meet the 10 cents per customer. Four options are given to meet this standard:

Option A: Energy-efficient landscape information is provided directly to customers. This could be in the form of bill stuffers, newspaper ads, or placed in a display kiosk in a prominent location.

Option B: A partnership is formed between the utility and local retailers to promote the benefits of trees planted around homes for saving energy. This could be the development of a brochure for retailers to have as a hand out.

Option C: A local tree planting program on private property is sponsored by the utility for the benefit of energy conservation.

Option D: The utility's Web site contains information on the benefits of trees in energy conservation, or the utility features its own energy conservation program on the site. Again, this would need to be related to the use of trees to qualify.



Documentation: Evidence of the energy conservation program utilizing trees. Include copies of brochures, newspaper articles, photos, or copy of web site.



COMPLIANCE STANDARDS

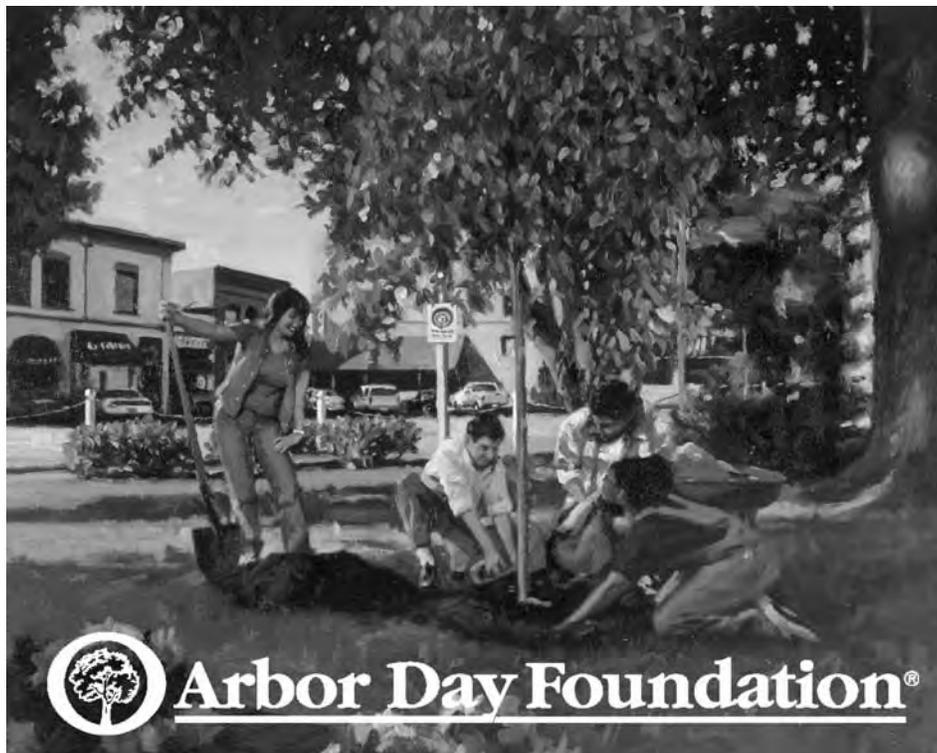
REQUIREMENT 5. ARBOR DAY OBSERVANCE

Arbor Day events are excellent opportunities to educate the public on the value and benefits of trees. These events can also provide the utility with valuable public recognition. The Tennessee Division of Forestry can also provide Smokey Bear and other materials for such events (contact the local county office). Arbor Day-specific materials can be ordered from The Arbor Day Foundation, as well.

Sponsorship or participation by the utility in a local Arbor Day ceremony (such as those found in Tree City USA communities) is a readily available method of meeting this standard. In this instance, photos of the event and a copy of the program would provide the necessary documentation. Where there is no Tree City celebration within the service area, a utility may host the Arbor Day celebration at a school or other public facility. In any event, the utility must be involved in a local Arbor Day ceremony.

While participation in local Earth Day or other environmentally-friendly events is encouraged, those events do not qualify for this standard by themselves.

Documentation: Newspaper clippings, copies of event programs, and/or photos should be included to provide the necessary documentation for this standard.



[HTTP://WWW.ARBORDAY.ORG/](http://www.arborday.org/)



APPENDIX

APPENDIX A: UTILITY IVM WORKSHEET

APPENDIX B: UTILITY CREW EVALUATIONS

APPENDIX C: TREE LINE USA MATERIALS



APPENDIX A: UTILITY IVM WORKSHEET

Date: _____

Note: All appropriate points that apply should be answered.

1. Chemicals

Does your utility utilize herbicides for vegetation management on your ROWs?

_____yes _____no

If yes, do all the applicators on your system possess pesticide licenses, according to TN Dept of Agriculture, Regulatory Services laws? _____yes _____no

Types of herbicides in use: (check all that apply)

____basal bark ____foliar ____stump surface ____aerial ____stem injection

____cut stubble ____other (define) _____

Approximate number of acres (miles) of ROW that were treated this year _____

Herbicides used:

_____, _____,
_____, _____

*Does your utility utilize plant growth regulators? _____yes _____no

*If yes, what chemicals do you use?

Mowing

Does your utility involve the use of mowing machines (bush hogs and others) to maintain ROWs?

_____yes _____no

Approximate number of acres (miles) of ROW mowed this year _____



APPENDIX A: UTILITY IVM WORKSHEET

3. Mechanical Pruning (tree removal)

Does your utility utilize mechanical pruning (tree removal) machines, such as Giraffes, on your ROWs?

_____yes _____no

*If yes, how many machines and what types are utilized _____

_____.

4. IVM Evaluations

Person(s) and their titles in charge of regularly evaluating IVM program for utility:

How often are evaluations conducted?

_____daily _____weekly _____monthly _____annually _____end of completed circuits/
units

Does your utility have a procedure for evaluating and managing hazardous trees?

_____yes _____no

5. Evidence of IVM Program

Does your utility have written utility specifications (documents) concerning vegetation management practices around sensitive areas, such as streams, wetlands, or other areas?

_____yes _____no

If so, please attach those specifications with this form.

Location and number of ANSI A-300 (Part 7) IVM Best Management Practices booklets:

_____.



APPENDIX B: UTILITY CREW EVALUATIONS

Date: _____

Inspector: _____

Crew: _____

Circuit/Area: _____ Total Miles: _____

Miles/Areas Trimmed: _____

Number of Tree Removals: _____

Customer Complaints/Addresses: _____

Utility Damages by Crew: _____

Safety Noncompliance by Crew: _____

Sites/Addresses of Contract Violations: _____

Total Score/Grade: _____



APPENDIX C: TREE LINE USA MATERIALS

FACT SHEETS:

PLANT TREES TO CONSERVE ENERGY

PLANT THE RIGHT TREE IN THE RIGHT PLACE

DON'T TOP TREES!

STORMS, TREE AND UTILITY LINES

TREES AND UNDERGROUND UTILITY LINES

TREE LINE USA STANDARDS

TREE LINE USA APPLICATION

Plant Trees to Conserve Energy

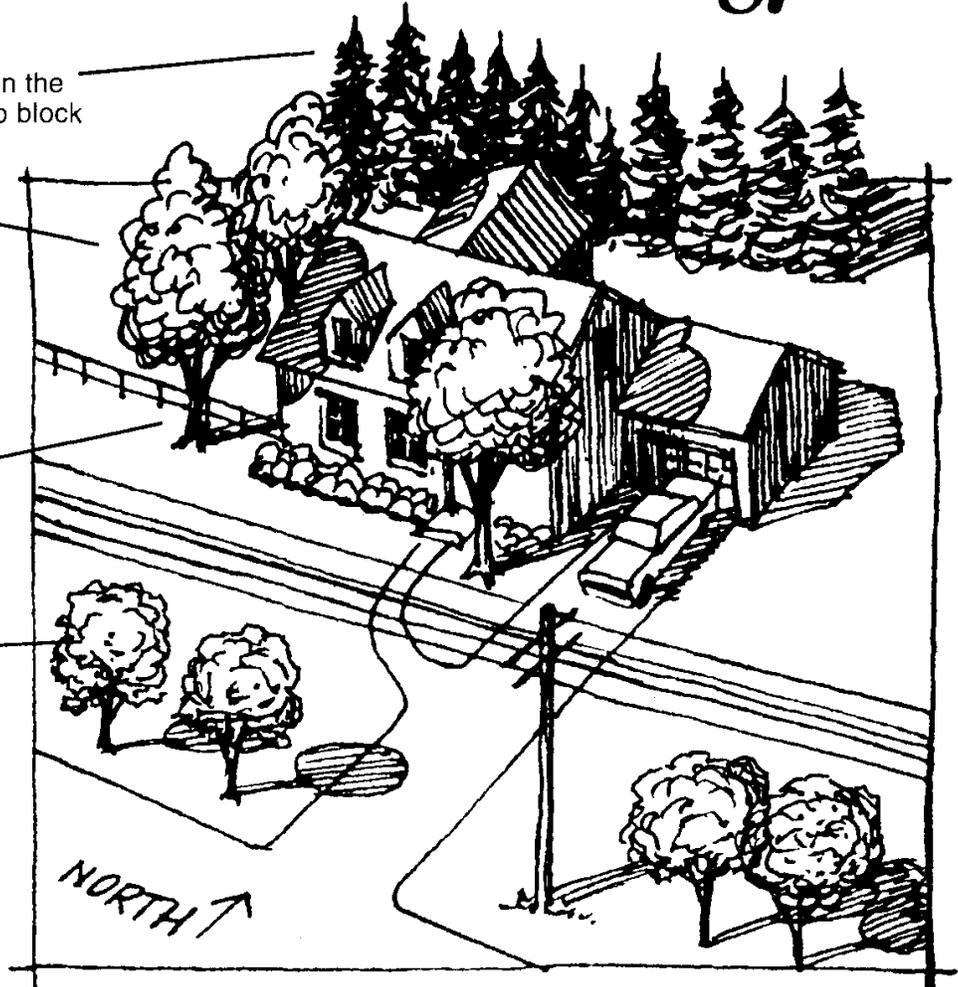
An evergreen windbreak on the north or northwest will help block cold winds in winter.

Large shade trees on the southeast, southwest, and west sides of the house provide cooling shade in summer but don't obstruct the low winter sun.

Maximum shade comes from deciduous (broad-leaf) trees, planted close to the house (about 10 feet).

Remember: short flowering trees won't clash with utility lines.

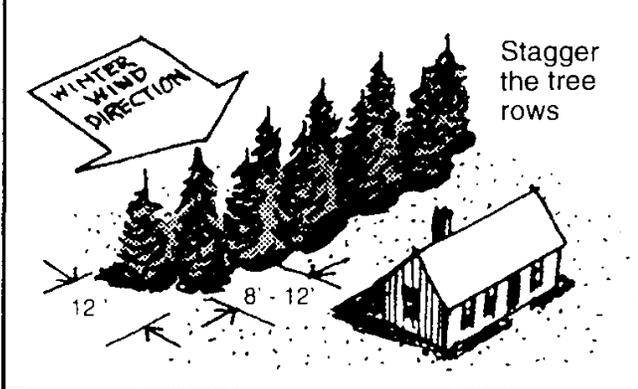
Shade from trees improves human comfort, reduces air conditioning costs, reduces peak electricity loads, lessening the chance of power outages.



Trees are an inexpensive way to save energy costs year-round!

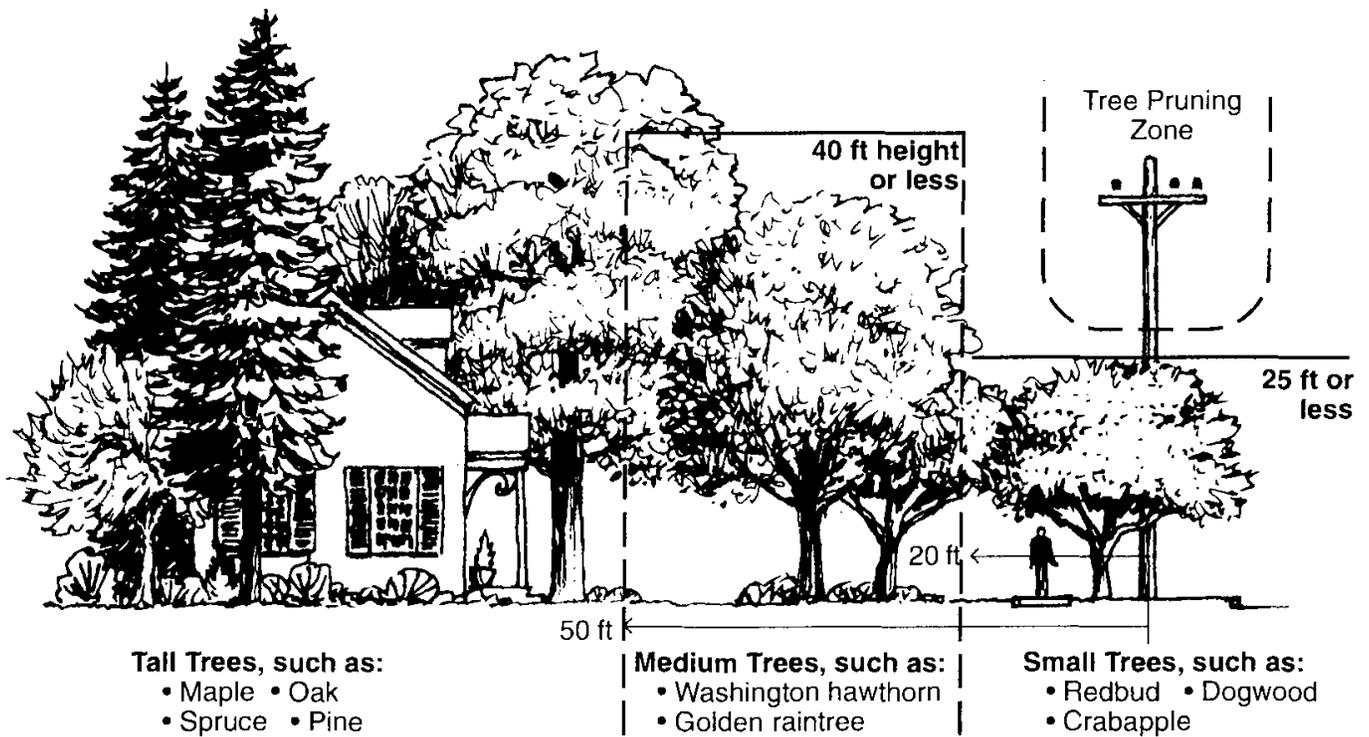
How to Plant Trees for Winter Warmth

Conifers form the best windbreaks. Two or more rows are best if space allows, but even a single row will help.



Planting trees can produce significant cash savings when they are properly used for shade and winter wind protection. Studies show that shade trees can produce savings of more than 50 percent in air conditioning use and associated energy costs.

The contribution of trees in winter may not be as obvious, but can be just as dramatic. Homes that use windbreaks can save as much as 17 percent on heating bills.



Plant the right tree in the right place

Taller trees should be planted away from overhead utility lines

Trees are prized possessions in our communities. They give needed shade in summer, help clear the air of pollutants, provide a home for songbirds and wildlife, and please the eye with the beauty of their foliage and blossoms.

But when a tree's branches start to come close to or actually touch utility power lines, a potentially hazardous situation is created.

Trees and power lines can co-exist, and potential conflicts can be avoided by selecting and planting trees with size and growth characteristics appropriate to their location:

Low Zone—beneath power lines and for 20 feet to either side of them, plant species that will not exceed 25 feet in height. Taller existing trees in this zone should be pruned to grow around the wires by the utility company.

Medium Zone—trees that grow no more than 40 feet in height are recommended for areas immediately adjacent to the Low Zone in order to avoid high branches that overhang power lines or trees that could topple into the lines during severe storms.

Tall Zone—higher trees could be used in any locations at distance of 50 feet or more from power lines. Trees near your house can provide significant energy benefits by providing cooling shade in summer and giving protection from winter winds.

Please call us if you have questions about where or what trees to plant near our power lines.

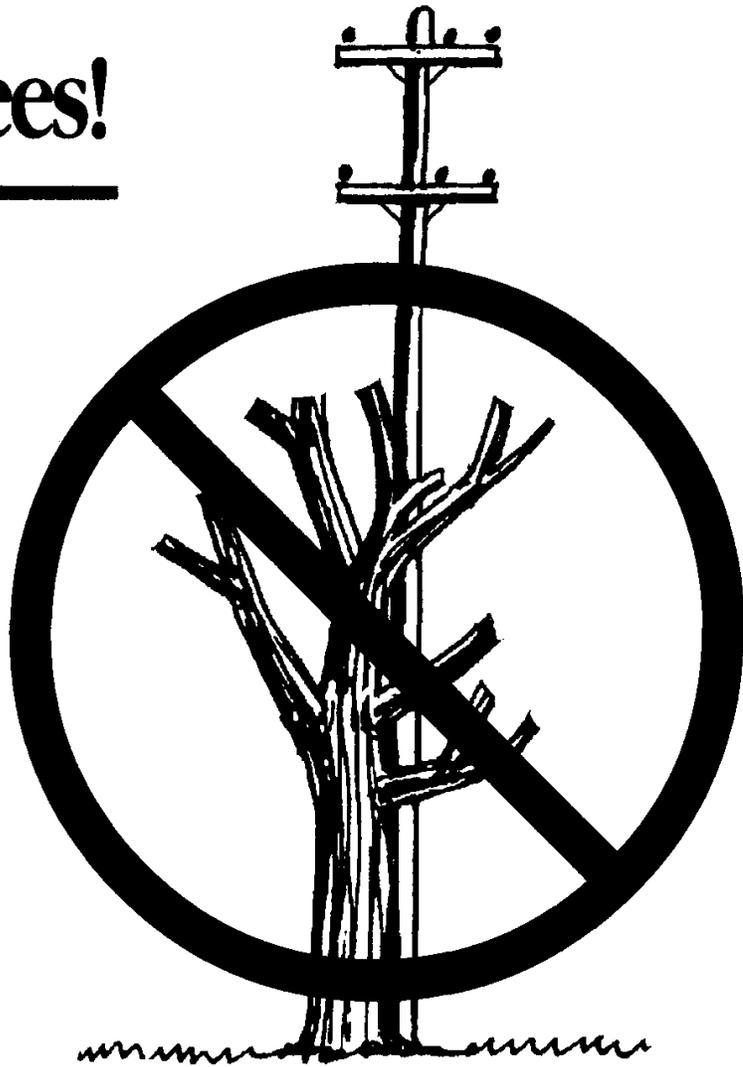
Don't Top Trees!

Cutting branches back to ugly stubs is one of the worst things you can do for your tree's health.

Topping destroys a tree's beauty and seriously reduces its ability to survive.

Tree care professionals say that topping — cutting main branches back to stubs — is the worst thing you can do for the health of a tree.

Your trees will lose their natural appearance, and the ugly, weakly-attached new limbs often grow back higher than the original branches. And these new limbs are more likely to be hazardous to people and property nearby.



4 Good Reasons Why NOT to “Top”

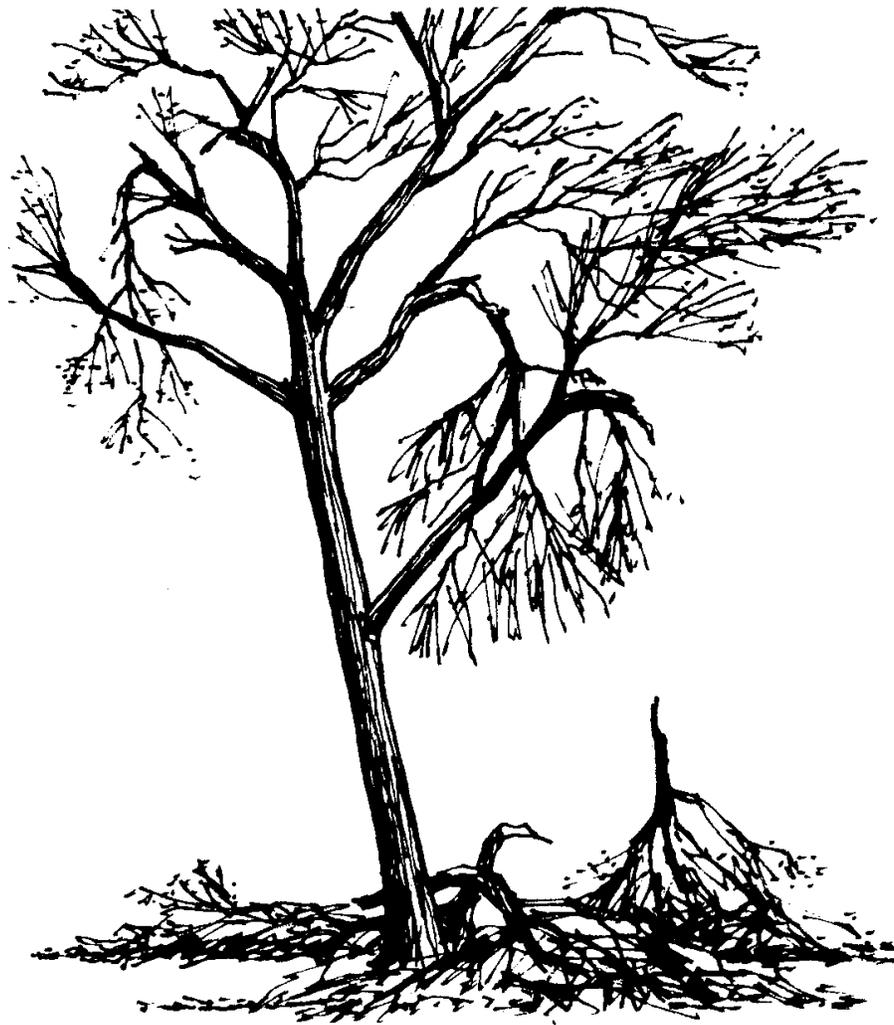
- **Tree Starvation:** Topping removes so much of the tree's leafy crown that it dangerously reduces the tree's food-making ability.
- **Insects and Disease:** The exposed ends of topped limbs are highly vulnerable to insects or decay fungi.
- **Weak Limbs:** New branches that grow from a stubbed limb are weakly attached and more likely to break from snow or ice weight.
- **Rapid New Growth:** Instead of controlling the tree's height, topping often results in more numerous, higher growing limbs than before.



Arbor Day Foundation[®]

www.arborday.org

UTILITY COMPANY
LOGO IMPRINT HERE



Storms, Trees & Utility Lines

When a storm strikes, it may look like the end of the world, but you can help your trees recover from storm damage.

Although they may look mortally damaged after a storm, trees have an amazing ability to recover from damage. With proper pruning and care, all but the most severely damaged are likely to regain their original health and beauty.

What You Can Do:

- ✓ First of all, stay away from downed power lines and dangerous hanging branches ready to fall.
- ✓ Assess the damage. If it's minor, careful pruning can generally put your tree on the path to recovery.
- ✓ Leave large limbs and damage to tree professionals. Look for an ISA certified arborist in the yellow pages under "Tree Service" or at www.ag.uiuc.edu/~isa.

Tree First Aid After a Storm:

1. **Take safety precautions.** Stay away from downed lines, and unless you really know how to use one, leave chainsaw work to the professionals.
2. **Remove broken branches** that are still attached to the tree. They should be pruned at the point where they join larger branches.
3. **Don't top your trees!** Never cut the main branches back to stubs. Ugly, weakly attached limbs will grow back and be even more likely to break off in a future storm.



Arbor Day Foundation[®]

100 Arbor Avenue, Nebraska City, NE 68410

UTILITY COMPANY
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Trees & Underground Utility Lines

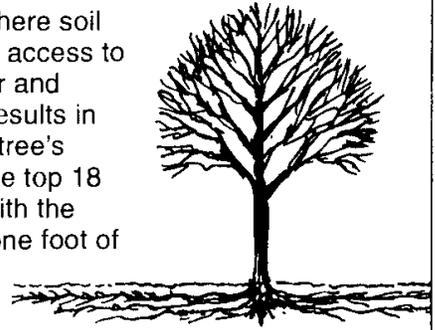
Hidden away beneath the soil, roots quietly go about doing their job. They anchor immense trees firmly against the wind, serve up vital water, and pry loose essential elements from the soil.

Most of a tree's roots lie less than eight to 12 inches below the surface, and they can grow outward to a distance one to two times the height of the tree.

Unfortunately, when trees grow in cities and towns, they must also share limited space with underground utility lines. In these crowded conditions, they live under constant threat of disturbance

Know Where Roots *Really* Grow

Roots spread where soil conditions allow access to soil nutrients, air and moisture. This results in about 85% of a tree's roots being in the top 18 inches of soil, with the majority within one foot of the surface.



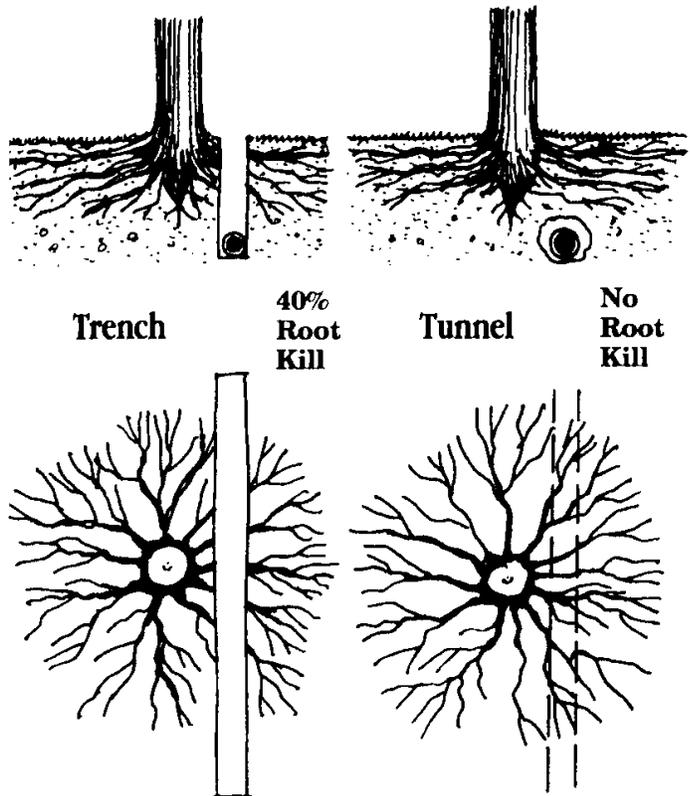
from utility installation or repairs, new lawn sprinkler systems, and any other activity that requires digging.

Why Tunnelling and Careful Trenching Can Save Trees

Trenching near a tree can kill as much as 40 to 50 percent of the tree's roots. This will almost certainly lead to stress, poor tree health, lack of firmness against wind, or outright death. A tunnel in the same place can preserve the tree's roots, with no resulting damage to the tree.

When tunnelling is not an alternative, the route of a trench can be altered to miss tree roots, or avoid as many of them as possible.

Homeowners should call "blue stakes" or "diggers hotlines" when digging in the vicinity of underground utilities.





Standards



1 Quality Tree Care

- a) **Utility Pruning:** Work practices are formally adopted for line clearance tree pruning that are consistent with current ANSI A300 Part 1 and as explained in *ISA Utility Pruning Best Management Practices*. These practices avoid topping, tipping, removing branch collars and leaving long stubs. Each worker who performs line clearance, including contractor workers, has read and understands ISA Utility Pruning Best Management Practices (or equivalent approved by your State Forester and the Foundation), follows its recommendations, and has a copy available for quick reference.

Attach Evidence: Indicate resource(s) utilized and include evidence of formal work practices

- b) **Integrated Vegetation Management (IVM):** Work practices are formally adopted for management of right-of-way vegetation that are consistent with current ANSI A300 Part 7 and as explained in *ISA Integrated Vegetation Management Best Management Practices*. These practices include setting objectives, evaluating sites, defining action thresholds, evaluating and selecting control methods, implementing IVM and monitoring treatment and quality assurance. Each worker who plans IVM work has read and understands the ISA IVM Best Management Practices (or equivalent approved by the State Forester and the Foundation), follows its recommendations, and has a copy available for quick reference.

Attach Evidence: Indicate resource(s) utilized

- c) **Underground Utility Construction:** Work practices are recommended for utility trenching and tunneling construction activities near trees, similar to methods described in *Trees and Development*, a publication from the International Society of Arboriculture (ISA). These practices reduce damage to roots and injury to trees. The utility has provided educational information on proper trenching and tunneling to its underground workers, such as “Trenching and Tunneling Near Trees: A Field Pocket Guide for Qualified Workers” by Dr. James R. Fazio, the ISA’s trenching and tunneling training video, or equivalent, as approved by the State Forester and the Foundation.

Attach Evidence: Indicate resources utilized

- d) **Compliance:** The utility’s vegetation management standards and work practices comply with all Federal, state, and local tree care statutes, regulations and ordinances.

Attach Evidence: Name of compliance manager or equivalent

- e) **Quality Assurance:** The utility has a quality control program and quality assurance process in place to confirm that the vegetation management work is completed in a manner consistent with the provisions for Quality Tree Care, items 1A & B above.

Attach Evidence: Summary of quality assurance program and name and title of manager or equivalent

- f) **Impact on the Urban Forest and Community Trees:** The utility vegetation management program includes collaboration with other urban forest advocates and managers and strives to enhance the positive impact of its vegetation management program on both the natural and urban forests.

Attach Evidence: Summary of actions and efforts that support the utility’s positive impact on the urban forest (i.e. letters of collaboration from municipalities or nonprofit tree planting groups, samples of print material highlighting steps taken by the utility.

2 Annual Worker Training

- a) **Employees, contractor workers and supervisors who perform pruning and right of way vegetation maintenance work for the utility complete annual formal training.** The focus of the training is comprehension of and compliance with Utility Pruning and Integrated Vegetation Management practices (Requirement 1A and 1B), as well as safe work practices per current ANSI Z133.1.

Attach Evidence: Training summary, including dates and topics

- b) **The utility ensures that training takes place and maintains documentation.** A utility designee ensures that worker training takes place and is documented.
Attach Evidence: Name of utility designee responsible for documentation and name of person responsible for field compliance.



3 Community Tree Planting and Public Education

A) The utility allocates an annual expenditure of at least 10 cents per customer for use in community tree planting programs throughout the service area. Community Tree Planting expenditures can be combined with Public Education and Energy Conservation Program expenditures (sections 4 and 5) to meet the 10 cents/customer threshold. Qualifying expenses can include trees planted by the utility company or funding provided to municipal or other tree planting organizations. Examples of community tree planting may include:

1. A utility tree planting program in utility right-of-way or on public property
2. A commercial building shade tree program promoting energy savings through strategically planted shade trees around businesses
3. Establishment of a “Right Tree-Right Place” demonstration garden or park
4. Documented tree planting programs for the purpose of offsetting the utility’s carbon footprint, enhancing storm water management or improving air and water quality

*** Transmission and hybrid utilities which are unable to calculate a per-customer expenditure due to no identifiable customer base are still required to document activities and expenditures in meeting standards 3 and 4.**

Attach Evidence: Summary of tree planting events/program with sample material and/or photos; Include expenditures on application page

B) The utility makes annual contact with all homeowners and customers for the purpose of providing educational information regarding tree-related utility issues. Public Education expenditures can be combined with Community Tree Planting and Energy Conservation Program expenditures (sections 3 and 5) to meet the 10 cents/customer threshold. Examples of relevant public education communications may include:

1. Information regarding identification of tree-related hazards
2. Tips on how to prune trees safely
3. Information on Right Tree-Right Place and appropriate site selection
4. Education regarding trees, power lines, and the danger of wildfire

5. Information on the vegetation management program available through the utility’s Web site
6. School-based tree/utility safety programs and presentations
7. Active support/recruitment of Tree City USA communities with their service area

Attach Evidence: Samples of print material, summary of public education events/trainings/programs with dates; Include expenditures on supplemental page

4 Tree-based Energy Conservation Program

The utility has a tree-based energy conservation program which makes special consideration of the benefits of trees in energy conservation. Energy Conservation Program expenditures may be combined with Community Tree-Planting and Public Education expenditures (sections 3 and 4) to meet the 10 cents/customer threshold. Examples of a tree-based energy conservation program may include:

- A. The utility provides energy-efficient landscape information directly to customers.
- B. The utility partners with local retailers to promote the benefits of trees planted around the home.
- C. A utility tree planting program on private property for energy conservation purposes.
- D. The utility provides web-based information on the benefits of trees in energy conservation or specific details on its energy conservation program.

Attach Evidence: Summary of tree-based energy conservation program; Include expenditures on supplemental page

5 Arbor Day Observance

Annual Arbor Day events are sponsored by or participated in by the utility. Utilities are encouraged to collaborate with other urban forest advocates, such as a municipality, school, or community tree-planting group to promote Arbor Day events.

Attach Evidence: Summary of Arbor Day observance with documentation

TREE LINE USA APPLICATION

Mail completed application with requested attachments to your State Forester no later than November 1. The Tree Line USA award is made in recognition of work completed by the utility during the calendar year. Provide information only for the current year. Be sure application fee (made out to Arbor Day Foundation) is included. (First year fee is \$150. Recertification fee is \$75.)

As _____ of _____,
(Title) (Name of utility as it should appear on recognition materials)

I herewith apply for official recognition as a TREE LINE USA Utility for _____, having met the requirements set forth
by the Arbor Day Foundation as noted below: (Year)

Requirement 1: Quality Tree Care

- A. **Utility Pruning:** Work practices are formally adopted for line clearance tree pruning that are consistent with current ANSI A300 Part 1 and as explained in *ISA Utility Pruning Best Management Practices*.

Attach Evidence: Indicate resource(s) utilized: _____

- B. **Integrated Vegetation Management (IVM):** Work practices are formally adopted for management of right-of-way vegetation that are consistent with current ANSI A300 Part 7 and as explained in *ISA Integrated Vegetation Management Best Management Practices*.

Attach Evidence: Indicate resource(s) utilized: _____

- C. **Underground Utility Construction:** Work practices are recommended for utility trenching and tunneling construction activities near trees, similar to methods described in *Trees and Development*, a publication from the International Society of Arboriculture (ISA).

Attach Evidence: Indicate resource(s) utilized: _____

- D. **Compliance:** The utility's vegetation management standards and work practices comply with all Federal, state, and local tree care statutes, regulations and ordinances.

Attach Evidence: Name of compliance manager or equivalent: _____

- E. **Quality Assurance:** The utility has a quality control program and quality assurance process in place to confirm that the vegetation management work is completed in a manner consistent with the provisions for Quality Tree Care, items 1A & B above.

Attach Evidence: Summary of quality assurance program and name and title of manager or equivalent

- F. **Impact on the Urban Forest:** The utility vegetation management program includes collaboration with other urban forest advocates and strives to enhance the positive impact of its vegetation management program on both the natural and urban forests.

Attach Evidence: Summary of actions and efforts that support the utility's positive impact on the urban forest (i.e. letters of collaboration from municipalities or nonprofit tree planting groups, samples of print material highlighting steps taken by the utility.)

Requirement 2: Annual Worker Training

- A. Employees, contractor workers and supervisors who perform pruning and right of way vegetation maintenance work for the utility complete annual formal training.

Attach Evidence: Training summary, including dates and topics

- B. The utility ensures that training takes place and maintains documentation.

Attach Evidence: Name of utility designee responsible for documentation and name & title of party responsible for field compliance

TREE LINE USA APPLICATION - *continued*

Requirement 3: Community Tree Planting and Public Education

- A. The utility allocates an annual expenditure of at least 10 cents per customer for use in community tree planting programs throughout the service area.

Attach Evidence: Summary of tree planting events/program with sample material and/or photos; Include expenditures on expenditure worksheet

- B. The utility makes annual contact with all homeowners and customers for the purpose of providing educational information regarding tree-related utility issues.

Attach Evidence: Samples of print material, summary of public education events/trainings/programs with dates; Include expenditures on expenditure worksheet

Requirement 4: Tree-based Energy Conservation Program

The utility has a tree-based energy conservation program which makes special consideration of the benefits of trees in energy conservation.

Attach Evidence: Summary of tree-based energy conservation program; Include expenditures on expenditure worksheet

Requirement 5: Arbor Day Observance

Annual Arbor Day events are sponsored by or participated in by the utility. Utilities are encouraged to collaborate with other urban forest advocates, such as a municipality, school, or community tree-planting group to promote Arbor Day events.

Attach Evidence: Summary of Arbor Day observance with documentation

To be completed by person submitting the application:

Signature

Title

Email

Date

TREE LINE USA APPLICATION - *continued*

Chief Executive Officer

Name: _____

Title: _____

Address: _____

Phone: _____ Email: _____

Public Relations/Information Contact

Name: _____

Title: _____

Address: _____

Phone: _____ Email: _____

Utility Forestry/Vegetation Management Contact

Name: _____

Title: _____

Address: _____

Phone: _____ Email: _____

Certification

(To Be Completed by the State Forester)

Utility

The above named utility has made formal application to this office. I am pleased to advise you that we reviewed the application and have concluded that, based on the information contained herein, said utility is eligible to be recognized and designated as a TREE LINE USA Utility, for the _____ calendar year, having in my opinion met the five requirements for protection and enhancement of community trees. The \$150 first year or \$75 subsequent year application fee is enclosed.

Person in State Forester's Office who should receive recognition material:

Name: _____

Title: _____

Agency: _____

Address: _____

City, State, Zip: _____

Phone: _____

Email: _____

Tree Line USA Expenditure Worksheet

Community Tree Planting Expenditures: _____

Public Education Expenditures: _____

Tree-based Energy Conservation Program Expenditures: + _____

Total Expenditures = _____

Divided by total number of utility customers: ÷ _____

Must be equal to or greater than 10 cents/customer = _____

My utility is exempted as a transmission or hybrid utility. (See Standard 3A)