City of Jacksonville Tree Commission
Urban Forestry Master Plan SubCommittee
March 16, 2023
9:30 AM

An immediate goal of the Tree Commission's Strategic Plan is to
"Obtain an Urban Forest Master Plan to guide future actions."

1. Presentation by Justin Gearhart, City Arborist

2. Stakeholder Perspectives

3. Typical Urban Forest Master Plan

   (examples)
   Urban Forest Management- A Primer to Strategic Planning for Municipal Governments
   City of Boston Urban Forest Master Plan
   ReLeaf Cedar Rapids

4. Funding Options

   Florida Urban and Community Forestry Grant – Joe Anderson, Forester, JEA
   City Budget

5. Agenda / discussion items for subsequent SubCommittee meetings

6. Establish SubCommittee Meeting Schedule

Attachment A

Urban Forest Management: A Primer to Strategic Planning for Municipal Governments Authored by Northrop, Andreu, Zipperer

A guide to assist in the development of a strategic plan for urban forest management.

Helps create manageable expectations

Focus on short-term decisions and long-term planning

Urban Forest Management Plan

20-year plan

- With 5 year-operational plans

Highly involved, resource intensive 2-year process to develop

Questions to ask ourselves:

- What do we have?
- What do we want?
- How are we going to get there?
- How do we determine if we have arrived?

What do we have?

- An inventory and several studies conducted on our canopy.
- A population that voted overwhelmingly for tree mitigation in 2000.

- Do we know how the general populace of Jacksonville feels today?
- Do we know the facets of the Urban Canopy that feel we should?

What do we want?

- As a large and diverse city, what are some common themes of the desires and needs of the people regarding our Urban Forest?
- Reactive vs proactive management: both are necessary and need to be flexible

How are we going to get there?

GOALS

OBJECTIVES

PLANS

How do we determine if we have arrived?

- Proper monitoring of plans and work conducted
- Criteria set prior to implementation of plan

- This is not a pass/fail statement. There can be varying degrees of success or failure. Progress is something to not discount.

An Urban Forest Management Plan Must Address:

Social Economic system:

- Population, wealth, history, etc....

Governance System:

- Budget, regulations, policies, etc....

Ecological System:

- Species composition, soils, hydrology, etc....

Things to think about

- Strategic planning is a social endeavor
  - Success or failure is usually determined by the people's values and whether they were included or not.
- The urban forest is not static, it is in a constantly fluid state
- This is an extremely involved and time-consuming process
  - There will be delays, many meetings over several years

Costs

Boston spent approximately $500,000 on their plan

Miami Beach spent $104,000 on their plan.

The lesson here is this isn't something we can just have a grant/matching funds for.

Money and ability to commit to the large amount of time are two huge factors in ability to conduct strategic planning

1. Plan Initiation and Engagement

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Step 1: Appoint Project Team

What:

Appoint a Project Team (2-3 people) to actively guide, facilitate and oversee the strategic urban forest management planning process. They need to be able to work together to meet a common goal of crafting a strategic plan for urban forest management programs.

Why:

Professional skills will be essential to successfully guide the strategic urban forest management planning process.

Who:

City Administration

How:

Appoint members of the Project Team that will bring needed expertise in project planning, meeting planning and facilitation, and consensus building, as well as forest science and ecology.

Attributes of a successful project team include:

- Knowledgeable and experienced in facilitation, consensus building and conflict resolution
- Experienced in multi-year strategic planning
- Knowledgeable about social survey design and analysis
- Knowledgeable and experienced in forest ecology, arboriculture and urban forest management.
- Knowledgeable and experienced in government processes including budgetary cycles; comprehensive planning; policy development; and development of ordinances and laws pertaining to urban forest management and land use change.

Our experience suggests...

1. Outside consultants may be disinterested and guide development of a strategic plan that is not tailored to specific social, ecological and governance conditions.
2. Ideally, the mandate for the initiation of this strategic planning process comes from the government's chief executive, to ensure that all departments and agencies fully cooperate in its development.

Project planning team. UF/IFAS photo by Tyler Jones

Step 2(a): Community Engagement

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Investigation of attitudes, perceptions and values concerning the urban forest held by the public and government agencies. Note: Steps 2(a) and (b) can be conducted simultaneously.

What:

Conduct a valid science-based investigation of the attitudes, perceptions and values of residents and public agencies concerning their interest in the conservation of the urban forest and its management. The responses to the investigation should reflect the diversity of public as expressed by the U.S. Census.

Why:

Urban forest management is a social endeavor. Whether on private property or on publicly owned land it is ultimately people's values which will determine which urban forest resources are conserved and how that will be accomplished.

Unlike the one-way flow of information in public relations, public participation is a two-way process between managers and the public. There are many 'publics' which often requires the use a more than one engagement tool.

Participatory processes and engagement tools:

- Random sample surveys
- Small workshops
- Neighborhood listening sessions
- Advisory committees
- Focus groups
- Nominal groups

Although urban forest management is often seen as a technical or a scientific discipline, it is primarily an expression of the values of those involved in mandating, shaping, opposing, or practicing it.

Who:

City Administration in cooperation with the Project Team

How:

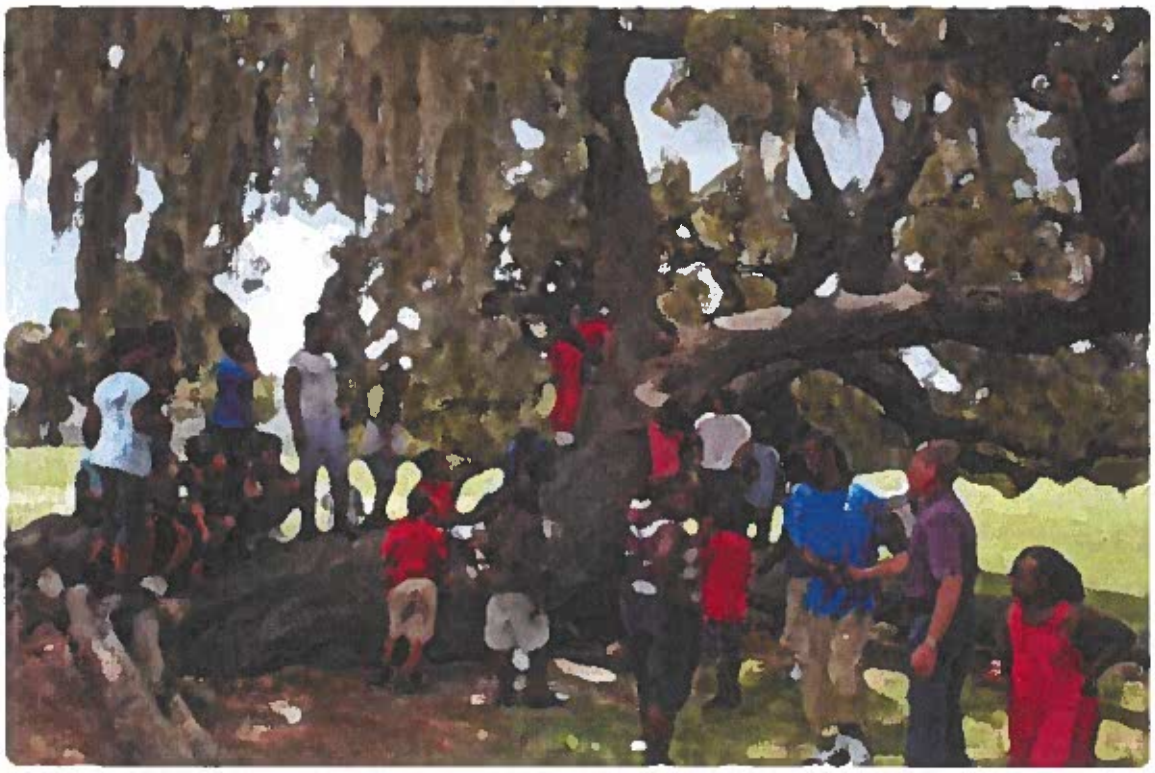
Online and in-person surveys, nominal groups sessions and focus groups (as needed) can provide structured information. Community meetings and listening sessions provide opportunities to interact with the community and learn from people's life experiences.

Work with people experienced in participatory planning (including the Extension Service and community organizers) to learn the best ways to engage the diversity of your city's residents. See Appendix A for an example of an online survey instrument.

Our experience suggests...

- It is not uncommon to find disenfranchised publics, competing and overlapping agencies and institutions, and a lack of awareness of environmental problems and solutions. If these issues are not recognized and addressed, problems will continue throughout the strategic planning process. A strong constituency of both the public and institutions is needed during the strategic planning process and to affirm and validate its continuation.
- The social survey should seek to answer questions concerning an understanding of the urban forest and residents' vision for the future urban forest.
- Contract out the design and implementation of the investigation to an experienced natural resources social scientist.

Help may be found at your state's land grant university or other colleges and universities.



City park in Tampa, FL

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Step 2(b): Design and Conduct the Ecological System (bio-physical) Inventory and Analysis

What:

Conduct a science-based ecological systems (bio-physical) inventory and analysis of the urban forest.

Why:

Results from this effort are used to advance the understanding of the urban forest resource; improve urban forest policies, planning, and management; provide data for potential inclusion of trees within environmental regulations; and determine how trees affect the environment and consequently enhance human health and environmental quality in urban areas.

Who:

City Administration in cooperation with the Project Team

How:

1. Inventory and analysis should be undertaken by individuals knowledgeable in designing urban forest inventories in cooperation with the Project Team.
2. The inventory and analysis should focus on data and information that is directly needed to support the strategic planning process. Conserve time and financial resources by gathering the highest priority and/or most easily obtained data first.
3. The inventory design should take into consideration capturing data at the various geographic scales (neighborhood, planning district, etc.) typically used by the city in planning and operations. This will be critically important in allowing the integration of city forest information into broader planning activities.
4. The physical field work can be contracted out and overseen by the Project Team.

Time to accomplish this step will depend upon size of area, diversity of land use types and level of detail required and funding available.

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Step 3: Reports on Analysis of the Social Survey and Bio-physical Inventory/Ecological Analysis

What:

Prepare reports on the results of the social survey and bio-physical inventory and ecological analysis. Place them on the city's dedicated urban forest management program website. Distribute them to all news and social media outlets, and workshop it with the City Administration and City Commission/Council.

Why:

The reports form the foundational information that sets the course for the strategic planning process.

Who:

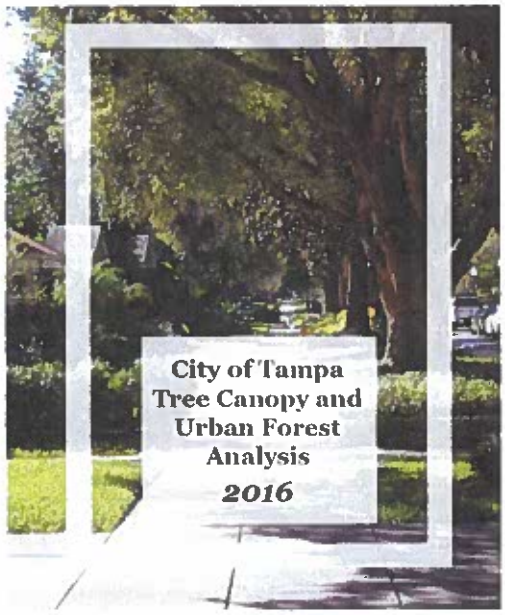
Project Team in cooperation with the natural resources' social scientist.

How:

The reports should be edited by a professional editor and graphic layout should be designed by a professional familiar with formatting for print, digital media, and social media.

See Appendix A.

Note: Enhance the reception of these reports by non-technical audiences through the development of concise and non-technical fact sheets and graphic illustrations.



Example of a bio-physical and ecological analysis report

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Step 4: Develop Guiding Principles

What:

Identify a set of Guiding Principles that define the legal limits and constraints of City management.

Why:

The Guiding Principles define and frame the broad constraints for municipal government management of the urban forest.

How:

Project team shall offer examples of common Guiding Principles for Municipal governance to initiate the discussion, and guide a consensus building session.

Who:

City Administration in cooperation with the Project Team

How:

Facilitated meeting of City Administration and Project Team

Examples of Guiding Principles:

- Government efficiency
- Economic growth
- Support social equity
- Maintain environmental integrity
- Increase the social, environmental and economic benefits of the urban forest while reducing costs
- Support unique character of neighborhoods
- Support basic tenets of the city's comprehensive plan

Our experience suggests...

- The Guiding Principles allow everyone working in the strategic planning process to understand the scope of what the municipal government can and cannot do regarding urban forest management.

The Guiding Principles should be revisited repeatedly throughout this entire process to as a helpful way to keep the process moving forward in a positive manner.

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Step 5: Announcement

What:

Announce intent to develop a strategic plan for urban forest management.

Why:

Publicly initiate the strategic urban forest management planning process with clear intent to operate transparently and engage the community throughout the strategic planning process.

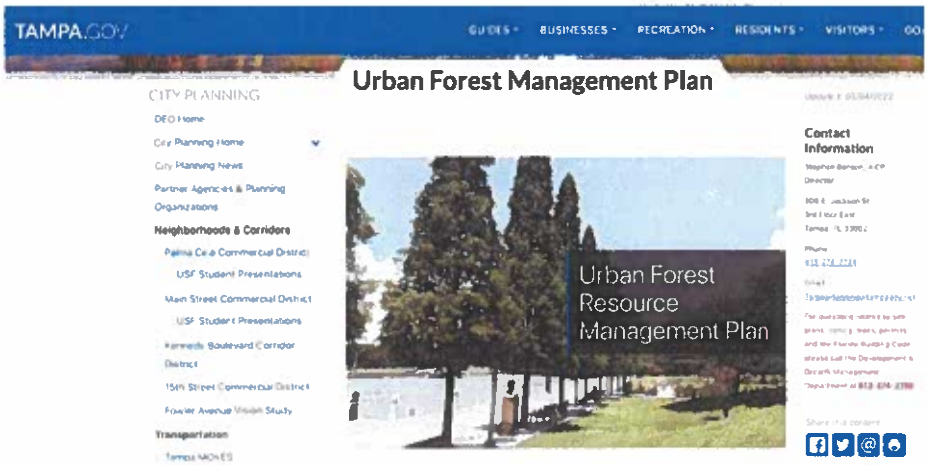
Who:

City Administration

How:

1. Provide news and social media outlets a narrative concerning the city's intent to develop a strategic plan for the urban forest management program and the proposed process.

Establish a dedicated City Strategic Urban Forest Management Planning website to provide a mechanism for open access to all associated strategic planning documents and allow public comments.



Example of urban forest management plan website.

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Step 6: Appoint a Public Committee

What:

Appoint a Public Committee representing the numerous and various societal interests in managing the urban forest.

1. The Public Committee should be limited to 10 – 15 people to allow for constructive facilitated interaction and development of trust.
2. The Public Committee should embody the diversity of values identified by the social survey.

Public Committee Membership:

Categories:
- Citizens
- Stakeholder groups
- Businesses
- NGO's
- Professional organizations
- Researchers

Characteristics:
- Volunteers
- Diversity
- Multiple partners
- Inclusive
- Skills and knowledge match the task

Why:

The Public Committee will represent the values of the public as identified in the social survey and articulate those values as a Vision and Goals for management. They will also serve as advocates for the public's values throughout the entire strategic planning process.

Who:

City Commission/Council with the Project Team

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Step 7: Workshop with Public Committee

What:

Workshop the results of the social systems survey, ecological system (bio-physical) inventory/analysis and Guiding Principles with the Public Committee.

Why:

The social systems survey and ecological system (bio-physical) inventory/analysis are the primary source information for the Public Committee's work.

Who:

Project Team

How:

Distribute complete written and digital reports to all members. Conduct a series of presentations and discussions guided by the Project Team.

Public committee workshop.

2. Plan Development

Year 1											
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Step 8(a): Development of the Vision

What:

Develop a **consensus** Vision Statement for urban forest sustainability.

Definition of Consensus:

A group decision-making process in which participants develop and decide on proposals with the aim, or requirement, of acceptance by all. The focus on avoiding negative opinion differentiates consensus from unanimity, which requires all participants to positively support a decision.

Example:

Vision Statement:

The urban forest is abundant, diverse, healthy, and benefits the community

Why:

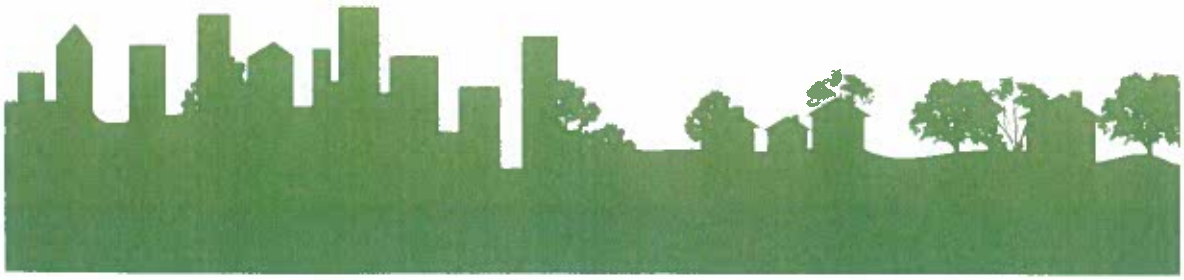
1. The vision statement defines, in qualitative terms, the purpose of the city urban forestry program; what the City is striving to achieve.
2. Vision statements ensure that developers of a plan have a common understanding about the intended outcome of management.

Who:

Public Committee

How:

The Project Team will guide a series of consensus building sessions for the Public Committees.



Our experience suggests...

- The Project Team remains completely neutral, resisting any calls or suggestions to provide options on the Vision.
- The Vision should be strictly based upon the values of the people, not technical experts.

This step may take 3 to 4 sessions. Take the time needed; it is fundamental to the planning process and committee members may be new to such a process.

Public committee developing a vision statement.

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Step 8(b): Development of the Goals

What:

Develop a broad set of Goals for urban forest sustainability. The Goals will frame the Plan's management actions toward achieving the Vision.

Example:

Vision Statement:

The urban forest is abundant, diverse, healthy, and benefits the community

Goals:

1. The urban forest should predominantly reflect the diversity of the surrounding native forest.
2. The urban forest should be healthy, resistant to insect infestation and diseases, and resilient to damage and disturbance.
3. The urban forest should include woodlands, parks, old trees that reflect the historic character of the region, tree-lined roadways, individual trees, and understory vegetation.
4. The urban forest should support a mutually enhancing relationship between the natural and the built environments.
5. Citizens and their government should be educated about the urban forest and its benefits.
6. The urban forest should bring beauty, interest, and a calming atmosphere to the urban environment.
7. The urban forest should support the city's communities' values and unique character.

Why:

Goals are envisioned as a large-scale reflection of public values concerning the bio-physical condition of the City's urban forest. They will be used to judge urban forest sustainability.

Who:

Public Committee

How:

The Project Team will guide a series of consensus building sessions for the Public Committee.

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Step 9: Report Vision/Goals

What:

Prepare report on the Public Committee's consensus Vision and Goals.

Why:

1. Foster collaboration and public participation in the decision-making process.
2. Ensure that all government officials continue to have full and open access to the process and that the pubic continues to see that the strategic planning process is operating transparently.

Who:

Project Team with Public Committee

How:

Place the report on the city's dedicated urban forest management website, release it to all news and social media outlets, and workshop it with the City Administration and City Commission/Council.

Note: Your municipal government may not need a formal workshop at this time. A concise briefing paper my suffice.

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Step 10(a): Appoint Internal Technical Advisory Committee

What:

Appoint an Internal Technical Advisory Group consisting of the directors of all agencies whose activities effect and/or are affected by the urban forest.

Example of Internal Technical Advisory Group memberships for a typical mid-size city in Florida:

- Budget
- Transportation
- Stormwater
- Water
- Wastewater
- Solid waste
- Police
- Fire
- Natural resource management
- Parks and recreation
- Urban forestry (natural resources)

Why:

1. The Internal Technical Advisory Committee will be responsible for crafting the body of the urban forest plan in a manner consistent with the Public Committee's Vision and Goals and the city's Guiding Principles.
2. The Internal Technical Advisory Committee will be responsible for ensuring that the City's urban forest plan is integrated into the formal and informal processes, functions and operations of the City government.

Who:

City Administration and City Commission/Council

1. Effective interdepartmental coordination is essential for consistent delivery of urban forestry programs.
2. Directors, or their appointees should follow the process throughout the plan development process.

Directors need to recognize that they are responsible for, and will sign off on, the final urban forest management plan for the city.

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Step 11: Develop Elements

What:

Develop one or more Elements (basic quantitative building blocks) for each of the Public Committee's Goals (qualitative).

Example:

Vision

The urban forest is abundant, diverse, healthy, and benefits the community.

Goal

1. The urban forest should predominantly reflect the diversity of the surrounding native forest.

Elements

- Canopy cover
- Invasive Species
- Abundance
- Standing Dead and Down Woody Material

See Appendix E for examples of Elements.

Why:

Elements, basic quantitative building blocks of the strategic plan, bring the broad qualitative goals that directly represent public values, into a quantifiable planning and operational framework.

Who:

Internal Technical Advisory Committee

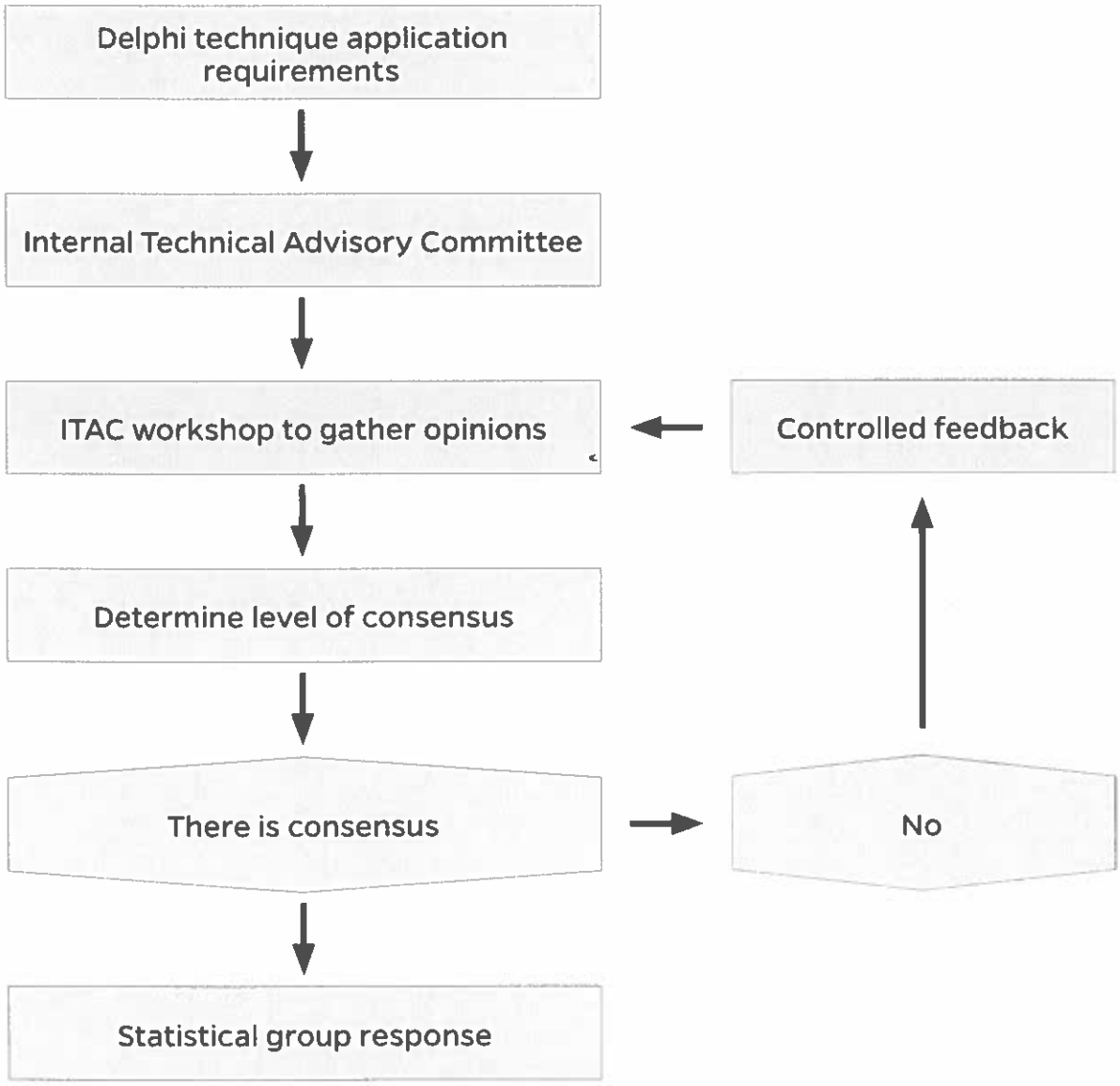
How:

Project Team guides a series of in-person consensus building sessions; may also use the **Delphi method** to reduce the number of in-person workshops.

See Appendix B for a description of Delphi method.

Our experience suggests...

1. The Delphi method reduces time on face-to-face meetings to aggregate opinions from a diverse set of experts, and it can be done without having to bring everyone together for a physical meeting.
2. The Delphi method is a process used to arrive at a group opinion or decision by surveying a panel of experts. Experts respond to several rounds of questionnaires and the responses are aggregated and shared with the group after each round.
3. The experts can adjust their answers each round, based on how they interpret the "group response" provided to them.
4. The ultimate result is meant to be a true consensus of what the group thinks.



Delphi method for use in iterative engagement to reach consensus

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Step 12: Determine Geographic Scale of Management

What:

Determine the appropriate geographic scale(s) of urban forest management units (i.e., land use, neighborhoods, planning districts, zoning districts, environmental justice areas, etc.) to achieve the Vision and Goals.

Why:

Working with planning districts, land use and/or neighborhoods allows the city the capability to identify site specific sets of long-term management objectives and short-term work plans. It also encourages the integration of urban forest management into the existing process fabric of city planning and operations.

Who:

Internal Technical Advisory Committee

How:

City planning typically takes place along planning districts boundaries; neighborhood boundaries; or census data tracts. Choosing the appropriate planning unit will vary from city to city.

Note

1. The scale used should support achieving the Vision and Goals.
2. Choosing the appropriate planning unit will vary from city to city.

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Step 13: Develop Objectives

What:

Develop one or more specific and measurable Objectives for each of the Elements.

Why:

Objectives are specific intended outcomes of the Elements. They are written in the present tense and become the long-range measurable targets of management.

Who:

Internal Technical Advisory Committee

How:

Project Team guides a series of in-person consensus building sessions; and may also use the Delphi technique (see Appendix B) to reduce the number of in-person workshops.

Our experience suggests...

1. This is a key step that initiates the shift from a qualitative statement description of the future in the Vision and Goals to quantifiable objectives that lead to the definition of actions.
2. It is important to remember that just because an Objective is not presently quantifiable it does mean that it is not relevant or important and should be left out.
3. Use the Delphi technique (see Appendix B) to reduce the number of in-person workshops.

Residential district in New York City, NY.

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Step 14(a): Form Consensus on Internal Consistency

What:

Critically review the Elements and Objectives for consistency with the Vision, Broad Goals and Guiding Principles.

Why:

Ensure internal continuity and integration of the Vision and Goals, Guiding Principles, Elements and the Objectives.

Who:

Public Committee determine if the Elements and Objectives are consistent with the Vision, Broad Goals and Guiding Principles.

How:

The Project Team, with assistance from the Internal Technical Advisory Committee, facilitates the review and documents comments. A follow-up facilitated meeting (Project Team) of both committees should be used to formalize consensus, if necessary.

Our experience suggests...

- This review for consistency can more easily be achieved by looking for Elements and Objectives that are 'inconsistent' with the Vision, Goals and Guiding Principles.
- The Delphi process can be used to allow members of both committees to review and make initial comments.
- This is a critical point where the strategic planning process can breakdown if the two committees cannot be reconciled.
- This is an opportunity in the process to step back and review progress to date.

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Step 14(b): Prepare and Distribute a Briefing Paper on the Plan To-date

What:

Prepare a briefing paper, with examples, demonstrating the consistency of the Vision, Goals, Guiding Principles, Elements and SMART Objectives. Place it on the city's dedicated urban forest management strategic planning website, release to news and social media outlets, place on the City's dedicated strategic planning web site, and workshop with City Administration and City Commission/Council.

Why:

Ensures that all government officials continue to have full and open access to the process and that the public continues to see that the strategic planning process is operating transparently and is consistent with societal values.

Who:

Project Team in cooperation with the Public Committee and Internal Technical Advisory Committee.

Natural area park, Tampa, FL.

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Step 15: Performance Indicators

What:

Develop a stepwise series of Performance Indicators for each Objective.

See Appendix E for examples of Performance Indicators, short- and long-term examples.

Why:

Quantifiable Performance Indicators enable measurement of progress toward the achievement of an Objective.

Who:

Internal Technical Advisory Committee

How:

1. Using the consensus Objectives, each member of the Internal Technical Advisory Committee drafts Performance Indicators on the Objectives most closely associated with their department's operational responsibilities. These draft Performance Indicators are then shared with all members of the Internal Technical Advisory Committee.
2. Project Team guides in-person workshops with the Internal Technical Advisory Committee to formalize consensus on the Performance Indicators and their language.

Our experience suggests...

- Performance Indicators are not management actions, but the outcomes of management.
- Identify the low and optimum performance indicators first, and then the moderate and good.
- There is no lead agency in this process—all members of the ITAC need to be engaged.
- Careful attention should be focused on the language of the Performance Indicators to ensure that they can be measured wherever possible.
- Pay close attention to the thresholds between adjacent Performance Indicators, they need to be clear and demonstrate a marked improvement in management outcomes.

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Step 16: Determine the Present State of Urban Forest Management Using the Performance Indicators

What:

Determine the present state of the urban forest system and its management.

Why:

Provide a baseline assessment of the urban forest's present condition and management relative to residents' expressed social values, and identifies points of departure for future City management activities.

Who:

Internal Technical Advisory Committee

How:

Use bio-physical inventory/analysis; social survey; other credible data; guiding principles and internal data from city departments to identify where the urban forest management program stands along the continuum of Performance Indicators for each of the Objectives.

Note

1. The tendency is for agencies to avoid giving themselves low marks. This will subvert the process and does not allow the future opportunity to recognize true progress in achieving management outcomes.
2. At times the present state is the optimal Performance Indicator.
3. Sometimes we are not sure of the present state.

Example:

Citywide

Element	Performance Indicators	Objective
Canopy cover (goal 1; element e)		Total tree canopy coverage is 50% or greater
Optimal	No statistically significant net loss of canopy cover since the 2016 Urban Forest Analysis	
Good	Canopy Cover is 45% or greater	
Moderate	Canopy Cover is 40% or greater	
Low	Canopy Cover is lower than 40%	

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Step 17: Determine How Performance Indicators Will Be Monitored

What:

Determine how progress on each Objective will be measured for timing of implementation and effectiveness in advancing the sustainability of the City's urban forest. This includes the frequency of measurement and the agency responsible.

Examples of monitoring implementation and effectiveness:

- Urban forest canopy – GIS or point sampling with aerial photography
- Stormwater function – 5-year cycle of iTree urban forest analysis
- Staff continuing education – departmental accounting reports
- Invasive species – 10-year cycle of natural areas assessments
- Energy reduction - % of new landscape plans that directly incorporate reduction of heat loading on buildings

Why:

1. Monitoring allows the City an opportunity to formally track the implementation of the 5-year operational plans; annual work plans; assess the effectiveness of the work undertaken; and demonstrate the continuing effort for process transparency. (See Appendix F)
2. Monitoring allows the City Administration an opportunity to report back to the City Council/Commission and the public on implementation of the Plan and progress on meeting intended outcomes.

Who:

Internal Technical Advisory Committee

How:

In cooperation with technical experts conduct a thorough review of data collection activities and timing of data acquisition for all Objectives.

Example:

Canopy cover – once every 5 years using USDA iTree tree cover assessment methodology (or other scientifically validated and inexpensive inhouse staff assessment)

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Step 18: Identify a Concise and Specific Set of Management Actions for Each Objective

What:

Identify concise and specific recommendations and measurable actions intended to incrementally elevate each set of Performance Indicators from its present state toward the next highest level.

Who:

Internal Technical Advisory Committee

Why:

These actions will be evaluated for proper sequencing of projects, costs, personnel and lead department or agency. It will be used to guide the organization of the 5-year operational plan.

How:

The Project Team uses brainstorming techniques to guide the Internal Technical Working Group in the identification of a concise and specific set of actions intended to elevate each present state Performance Indicator.

Note

1. This should produce the full set of all valid actions and their sequencing that can elevate each set of Performance Indicators to its next highest level.
2. All valid actions are not to be judged by budget needs, resources, etc. at this time

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Step 19(a): Form Consensus on the Preferred Set of Management Actions

What:

Form consensus on a preferred set of management actions that will constitute the city's 5-year Operational Plan.

Why:

This step sets the city's urban forestry operational agenda for the next 5 years, integrating it into the government's budget and administrative processes.

Who:

Internal Technical Advisory Committee

How:

The Project Team conducts a guided workshop(s) to refine suggested actions and form consensus on the final set of management actions that will constitute the first city's 5-year Operational Plan.

Note

1. These decisions must be made at the highest level of administrative authority in each department.
2. The Internal Technical Advisory Committee should be prepared to defend their rationale for the chosen actions.

Example:

Element	Performance Indicators	Objective
Canopy cover (goal 1; element e)		Total tree canopy coverage is 50% or greater
Optimal	No statistically significant net loss of canopy cover since the 2016 Urban Forest Analysis	
Good	Canopy Cover is 45% or greater	
Moderate	Canopy Cover is 40% or greater	
Low	Canopy Cover is lower than 40%	

Consensus Preferred Management Action(s) for the next 5 years

1. Design and implement a canopy cover monitoring program– Public Works, Planning Depts.
2. Prepare a digital City of 'illustrated booklet' on tree care and maintenance Best Management Practices for inclusion on urban forestry web site – Public Works Dept.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
								x			

Step 19(b): Prioritize and Sequence Management Actions for the 5-year Operational Plan

What:

Prioritize and sequence actions in the 5-year Operational Plan.

Why:

In setting priorities and sequencing, consider the urban forest's contribution to the city's social, economic and environmental well-being; improving efficiency and effectiveness of urban forest management; and the opportunity for success in abating types, scope and severity of threats, key enabling conditions.

Who:

Internal Technical Advisory Committee

How:

Review all proposed actions for cost, impact, and need for sequencing with other management actions.

Developed Parks/Open Space

Objective: Tree and shrub diversity reflect the native forest.

Optimal Performance Indicator: Net increase of native shrub and tree diversity in developed/open space land use type.

Example: Sequencing actions to reach a Performance Indicator.

3. Plan Re-engagement and Adoption

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
								x			

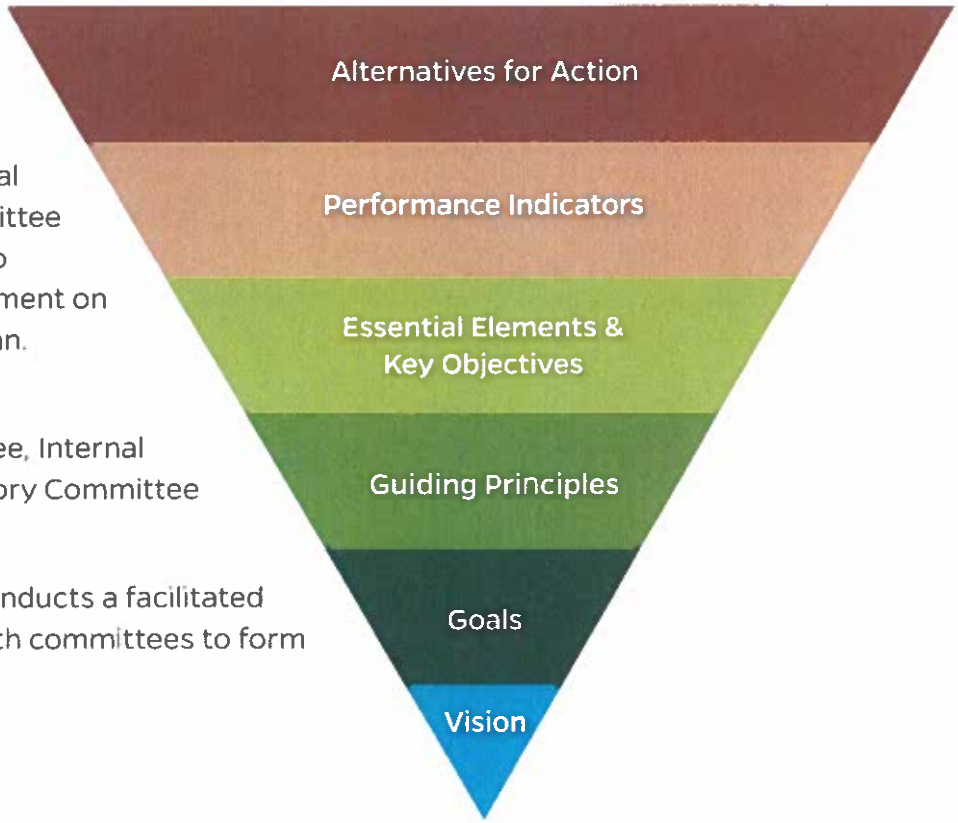
Step 20(a): Develop Consensus on Internal Consistency of the 5-year Operational Plan with the Strategic Plan

What:

Form consensus on the internal consistency and continuity of the plan with regard to the social and bio-physical analyses, Vision, Goals, Guiding Principles, Elements, Objectives, Performance Indicators, and 5-year Operational Plan.

Why:

This is the initial step in bringing the Public Committee and Internal Technical Advisory Committee back together to formalize agreement on the Strategic Plan.



Who:

Public Committee, Internal Technical Advisory Committee

How:

Project Team conducts a facilitated workshop of both committees to form consensus.

Note

1. The Delphi process in conjunction with the workshop to develop final consensus can be used.
2. The strategic planning process is now reaching into the micro level.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
								x			

Step 20(b): Prepare Interim Report on the Consistency and Continuity of the Plan

What:

Prepare interim report on internal consistency and continuity of the Plan. Place it on the city's dedicated urban forest management strategic planning website, release to news and social media outlets, and workshop with City Administration and City Commission/Council.

Why:

Ensure that all government officials continue to have full and open access to the process and that the pubic continues to see that the strategic planning process is operating transparently on this potentially contentious topic.

Who:

Project Team

How:

This interim report should be in the form of a short briefing paper.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
									x		

Step 21: Prepare an Interim Report on the Plan

What:

Prepare an Interim Report on the Urban Forest Management Strategic Plan, including the Operational Plan for the first 5-year cycle.

Why:

The Interim Report of the Strategic Plan for the Urban Forest Management Program will be used for technical reviews and checks on internal consistency with the Vision, Goals, Guiding Principles, Elements, Objectives, Performance Indicators and Actions.

Who:

Project Team

How:

Project Team, in cooperation with municipal agencies, develop the plan's structure and use existing narratives, briefing papers, inventories and analyses to organize the content.

Workshop for city administration and city council

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
										x	

Step 22: Workshop with Public Committee, City Administration and City Commission/Council

What:

Workshop the Interim Report on the Strategic Plan for the Urban Forest Management Program with the Public Committee, Internal Technical Advisory Committee, City Administration and City Commission/Council.

Why:

These workshops are intended to facilitate any last minute minor adjustments to the language of the Plan and provide the Public Committee an opportunity to ensure the Plan remains consistent with the Vision and Goals.

Ensure that all government officials continue to have full and open access to the process and that the public continues to see that the strategic planning process is operating transparently.

Who:

Project Team

How:

Distribute complete written and digital reports to all members. Conduct a series of presentations and discussions guided by the Project Team.

Note: Any last-minute changes to the plan, beyond clarification of language, are to be disallowed. All active participants have had numerous opportunities to express their opinions and work toward the integration of their ideas into the plan throughout the planning process.

Public workshop with city council.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
										x	

Step 23: Final Draft

What:

Produce a final draft of the Urban Forest Management Strategic Plan, including management operations for the first 5-year cycle.

Why:

Ensure that all government officials continue to have full and open access to the process and that the public continues to see that the strategic planning process is operating transparently and has opportunity to comment.

Who:

Project Team

How:

The final draft is edited by a professional editor; and graphic layout is designed by a professional familiar with formatting for print, digital media and social media.

Place on the city's dedicated urban forest management strategic planning web site, release to news and social media outlets and workshop with City Administration and City Commission/Council.

Year 2											
Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec
											x

Step 24: Formally Adopt and Execute the Plan

What:

Formally adopt the Urban Forest Management Strategic Plan as the City's urban forest management plan

Who:

City Commission/Council and City Administration

Why:

Incorporation of the Urban Forest Management Strategic Plan into the city's Comprehensive Plan ensures that strategic plan is integrated into the foundational structure of the government. The issuance of the Executive Order (Mayor, Governor, etc.) directs all government agencies to directly participate in enacting the strategic plan and its subsequent operational plans.

How:

1. City Commission/Council approves the Plan as the City's Urban Forest Management Plan.
2. The City Urban Forest Management Plan is incorporated into the City's Comprehensive Plan.
3. An Executive Order is issued to initiate implementation of the City's Urban Forest Management Plan.

4. Plan Implementation and Accountability

Step 25: Create a Permanent Advisory Committee on Natural Resources

What:

Create a permanent Natural Resources Advisory Committee (NRAC), consisting of a balanced representation of the city's public social, economic, and environmental interests.

Why:

Ensure citizen values are continually represented in the refinement and implementation of the City's cycle of 5-year urban forest management Operational Plans.

Who:

City Commission/Council and City Administration

How:

In cooperation with the Planning Department, conduct a semi-annual review of progress in implementation of the 5-year Operational Plan (implementation monitoring).

In cooperation with the Internal Technical Working Group, annually prepare a written report on the implementation of the 5-year Operational Plan for the Mayor and City Commission/Council.

Note: Consider including a member(s) of the original Public Committee to ensure continuity between the planning and implementation phases of the urban forest management plan.

Step 26: Establish a Permanent Internal Technical Working Group

What:

Establish a permanent Internal Technical Working Group (ITAC) comprised of appointed departmental representatives to identify issues and make recommendations associated with the successful implementation of the Plan.

Why:

Identify procedural and process issues that impact the efficient and effective implementation of the City's current 5-year Operational Plan, identify successful strategies and recommend corrective actions and strategies.

In cooperation with the Advisory Committee on Natural Resources, annually prepare written report to the Mayor and City Commission/Council on implementation of the current 5-year operational Plan.

Who:

City Administration

How:

1. The committee meets regularly to review progress, identifies issues and makes recommendations associated with the successful implementation of the Plan.
2. The Planning Division Manager or Director of Planning and Development Department shall chair the Working Group.
3. Most of the work of this committee can be accomplished through the use of a modified Delphi process, reducing the need for workshops.

Our experience suggests...

- This step is crucial to the institutionalization of the urban forest management plan.
- The Director of Planning, or equivalent, because of the broad perspective their position inherently has, is in a good position to serve as the chair the Internal Technical Working Group.

Step 27 (repeat this Step during the 4th year of each 5-year Operational Plan cycle)

What:

Validation Monitoring and Development of subsequent 5-year Operational Plans.

Why:

In response to evaluation and new conditions, revise the operational plan following the 5-year interval of social and bio-physical assessments.

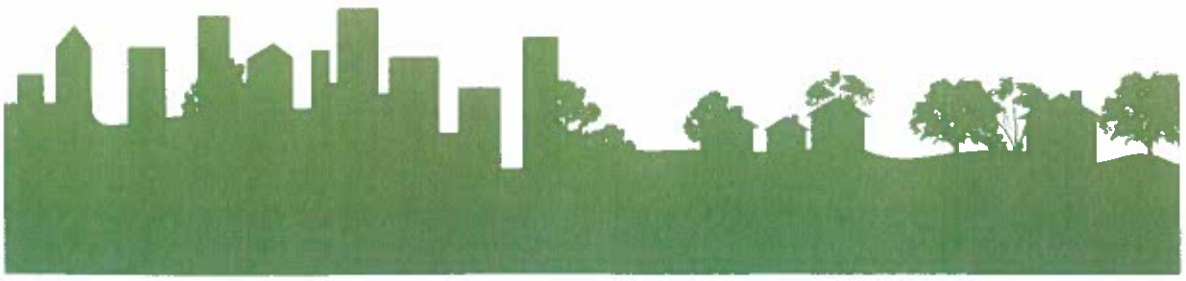
Who:

Internal Technical Working Group and Advisory Committee on Natural Resources, in cooperation with technical experts

How:

1. Starting in year-4 of the 5-year cycle facilitate consensus building session using Steps 2(a) – 4(b); 6; 10(b); 16; 17 and 19(a) to guide development of the next 5-year operational Plan.
2. Prior to contracting the 5-year Ecological System (bio-physical) Analysis and Social System Survey review the scientific methods and models to be used to characterize the urban forest and citizen values. Choosing appropriate forms of analysis will be extremely valuable in supporting management decision-making.
3. Prepare the 5-year Operational Plan for review by City Administration and City Commission/Council for formal adoption.

Note: Using our example of a 20-year long-range Strategic Plan with four imbedded 5-year short range operational plans, during the last 2 years of the fourth 5-year operational cycle, a new strategic planning process should be initiated.



Attachment C

Urban Forest Management; A Primer to Strategic Planning for Municipal Governments

Introduction

The purpose of this guide is to assist in the organization of a strategic plan for urban forest management. This guide was written specifically for use by people responsible for the initiation, or redesign, an urban forest management program. The methodology is flexible, adaptable and appropriate for town, city, county and state urban forest management program development. It was initially developed for use in the State of Florida but this framework can be applied universally.

An effective and sustainable urban forest management program must address three major components: **social systems, governance systems, and the ecological systems**. The **social component** provides the justification for the plan by demonstrating value to the people that live and utilize the forest. The **governance component** provides guidance to responsible entities on how, when and where management activities will occur. The **ecological component** addresses the dynamic nature of the system, which is the reason this process is different than simply managing other infrastructure such as transportation systems, sewer systems or electrical grids. As you might expect, the social and governance components add a level of complexity to the planning process not often encountered when developing an urban forest management program. Ideally these three components are integrated throughout the plan to inform government department procedures, policies, and other activities.

This guide will lead you through a series of steps to develop a long-range strategic plan* that will:

1. Identify the perceptions and values of the citizens;
2. Create a citizen-based vision for the urban forest;
3. Identify broad qualitative goals that define the vision;
4. Draw up guiding principles that define the limits of government purpose and action;
5. Identify quantifiable management objectives;
6. Implement plans (short range);
7. Develop annual work plans; and
8. Monitor implementation and effectiveness.

Strategic Planning Steps

The following 28 strategic planning steps represent a deliberative, iterative and inclusive process for the organization of a comprehensive urban forestry program. The resulting urban forestry program will be place-based, cooperative, multi-party and grounded in high-quality science.

1. Plan Initiation and Engagement (months 1-8)

Step 2(a):	Community Engagement
Step 2(b):	Design and Conduct the Ecological System (bio-physical)
Step 3:	Reports on Analysis of the Social Survey and Bio-physical Inventory/Ecological Analysis
Step 4:	Develop Guiding Principles
Step 5:	Announcement
Step 6:	Appoint a Public Committee
Step 7:	Workshop with Public Committee

2. Plan Development (months 9-21)

Step 8(a):	Development of the Vision
Step 8(b):	Development of the Goals
Step 9:	Report Vision/Goals
Step 10(a):	Appoint Internal Technical Advisory Committee
Step 10(b):	Workshop Internal Technical Advisory Committee
Step 11:	Develop Elements
Step 12:	Determine Geographic Scale of Management
Step 13:	Develop Objectives
Step 14(a):	Form Consensus on Internal Consistency
Step 14(b):	Prepare and Distribute a Briefing Paper on the Plan To-date
Step 15:	Performance Indicators
Step 16:	Determine the Present State of Urban Forest Management Using the Performance Indicators
Step 17:	Determine How Performance Indicators Will Be Monitored
Step 18:	Identify a Concise and Specific Set of Management Actions for Each Objective
Step 19(a):	Form Consensus on the Preferred Set of Management Actions
Step 19(b):	Prioritize and Sequence Management Actions for the 5-year Operational Plan

3. Plan Re-engagement and Adoption (months 21-24)

Step 20(a):	Develop Consensus on Internal Consistency of the 5-year Operational Plan with the Strategic Plan
Step 20(b):	Prepare Interim Report on the Consistency and Continuity of the Plan
Step 21:	Prepare an Interim Report on the Plan
Step 22:	Workshop with Public Committee, City Administration and City Commission/Council
Step 23:	Final Draft
Step 24:	Formally Adopt and Execute the Plan

4. Plan Implementation and Accountability (months 24+)

Step 25:	Create a Permanent Advisory Committee on Natural Resources
Step 26:	Establish a Permanent Internal Technical Working Group
Step 27	(repeat this Step during the 4th year of each 5-year Operational Plan cycle)

Attachment D

FLORIDA URBAN AND COMMUNITY FORESTRY GRANTS

SUMMARY

Available annually to local governments, educational institutions, Native-American tribal governments and legally organized nonprofit (volunteer) organizations in the following categories:

- Public Tree Canopy Improvement (Tree Planting)
- Public Tree Inventory or Urban Tree Canopy Assessment
- Urban Forest Management Planning
- Urban Forestry Information and Education

Grants are a 50/50 match (50 percent federal/50 percent applicant) ; maximum grant allocation is $50,000 for each category and each applicant. No entity will receive a total amount of funding over the maximum single grant award ($50,000). Employee salary may be used as matching funds. (only time spent on the grant project may be used as match).

Funds are allocated to recipients in January of the year following the award with a contract to begin work issued in March of the year following the award.

Administration includes a short quarterly progress report during the contract term and requires a final report at the conclusion of the contract.

Practices may be implemented on County owned lands, including parks or natural areas, as well as highway and street rights of way not maintained by the Federal government.

Funds will be allocated to regions with priority given to fiscally distressed communities.

Attachment E

TALLAHASSEE FL URBAN FOREST MASTER PLAN

September 2018

Fred Pope Review 3/15/2023

I. CURRENT URBAN FOREST

- A. Tree canopy Quality/ Species Composition
- B. Urban development trends
- C. Management approach
- D. Available resources
  1. Staff
  2. Budget
  3. Tree Inventory
- E. Regulations
  1. Landscape & Tree Protection Regulations
  2. Subdivision Regulations
     - a) 1-4" tree or 2-4" trees up to 5000 sq ft of lot area
     - b) 1-2" tree for each additional 2500 sq ft
- F. Overall Tree canopy/Urban Development Trends
  1. Overall canopy comparison with other cities
  2. Canopy cover by census blocks
  3. Canopy cover by land use
  4. Household income
  5. Population density
- G. Inventory of City Managed Trees (R.O.W., parks, other city lands
  3. Number of trees
  4. Condition
  5. Age
  6. Diversity
  7. Invasive species
  8. Tree conflicts with overhead utilities, hardscapes
  9. Wind resistance (Number & percentage of high, medium-high, medium-low and low resistant trees).
- H. Community involvement
  1. Community Players
  2. Neighborhood Engagement/ public awareness
  3. Green industry involvement
  4. Other groups/ private developers

II. ANALYSIS OF STREET TREE ASSET MANAGEMENT

- A. Available Urban Forestry Data and Tree Canopy Studies Prepared by Consultants
- B. Staffing
- C. Current Funding level
  1. Average budget for tree care
  2. Average budget per tree
  3. Average budget per capita
  4. Percent of total City budget

D. Budget Allocation per Task
   1. Maintenance
   2. Tree planting
   3. Staff
   4. Other
C. Budget per Management Area
   1. Street trees
   2. Park Trees
   3. Other Public Property
F. Comparison with Other Cities
G. Equipment
H Policies and Procedures
   1. Formal Management Plan?
   2. Proactive or Reactive
I. Level of Strategic Planning to identify and implement tree planting projects that are targeted to support citywide goals, and address neighborhood tree canopy deficiencies
J. Level of communication with private and public entities

III. **GOALS**

A. Complete inventory of trees on public properties
B. Transition into Proactive Tree Maintenance and Planting Program
C. Evaluate and recommend improvements to development regulations regarding tree preservation, planting and maintenance
D Develop city-wide tree planting program to:
   1. Improve tree species and age diversity
   2. Equitably allocate of tree planting to under-served, and low-income areas with deficient tree canopy, and drainage issues.
E. Emphasis planting of species which are long-lived, wind-resistant, and have other beneficial qualities
F. Set goal to achieve an urban forest composed of no more than 10% of one tree species, 20% of one genus, and 30% of any family.
G. Set annual planting benchmarks
H. Increase the diversity of trees available from wholesale nurseries
   1. Encourage wholesale tree growers to grow species reflective of City's Preferred Species list by the use of incentives such as contract growing
   2. Increase public demand for underutilized desirable trees by educating the public and developers about the benefits of these trees
   3. Share with nurseries the estimated number of trees per species that will be planted by the City over a period of years.