



Content Requirements for Arborist Reports

County of Ventura • Resource Management Agency • Planning Division
 800 S. Victoria Ave., Ventura, CA 93009 • (805)654-2488 •
www.ventura.org/rma/planning/Permits/tree.html

Oak, sycamore and other trees over a certain size are protected by Ventura County and subject to the requirements of the Ventura County Tree Protection Ordinance. Other than minor pruning, the removal, alteration or encroachment into the tree protection zone (TPZ) of a protected tree requires the approval of the Ventura County Planning Division.

Before the Planning Division will approve various types of requests to alter or remove protected trees, a technical evaluation from a qualified arborist must be submitted. These technical evaluations can either be in the form of an Arborist Verification or an Arborist Report. An Arborist Verification provides basic, targeted information on a County form. An Arborist Report provides more comprehensive information that adheres to the County's content requirements. For most ministerial tree permits and authorization letters, an Arborist Verification is required. For discretionary tree permits, an Arborist Report is required. See the document *Submittal Requirements for Tree Permits and Authorizations* more information on which permit type you may need.

This document outlines the specific content requirements for Arborist Reports.

Arborist Qualifications. Arborist Reports must be prepared by an arborist certified by the International Society of Arboriculture (ISA) or a related professional, such as a landscape architect, with qualifying education, knowledge and experience, as determined by the Planning Director.

Required Report Content

The scope of Arborist Reports will vary based on the nature of the proposed project, site conditions, number of trees involved and other factors, but in all cases the Planning Division requires that Arborist Reports be formatted such that all key information is easy to find. For most situations, Arborist Reports must present information using the headings below. Other headings may be added if necessary. Where the information is not relevant, this should be indicated and briefly explained. For ease of evaluation, table formats are recommended where appropriate. A digital copy of the Arborist Report is requested.

1. Background
2. Site Observations
3. Tree Condition and Impact Table
4. Individual Tree Analysis
5. Appraisals
6. Discussion
7. Recommendations
8. Supporting Information
9. Tree Protection Plan (when applicable)

Prior to hiring an arborist, contact the Planning Division to clarify the type of arborist documentation that is required.

Arborist Reports that provide inadequate information will be returned as INCOMPLETE.

For more information on the Tree Protection Ordinance including the County's list of protected trees, go to www.ventura.org/rma/planning/Permits/tree.html.

1. **Background**

Include the following:

- Contact information of: property owner, project applicant (if different from owner), and arborist (include ISA or other relevant certification number).
- Assessor parcel number(s), project location
- Assignment (# of trees evaluated, reason for the tree permit request, limitations)
- Inspection date

2. **Site Observations**

In order to provide context, briefly describe the site from a landscape perspective. Include such factors as whether the tree is isolated or part of a larger stand or woodland, exposed or shaded, sloped or flat, on a hilltop or in a ravine, etc.

3. **Tree Condition and Impact Table**

Summarize, in table format, information about protected trees that may be affected by the project. Include the following fields: tree number, species, girth, heritage (yes/no), hazardous (yes/no), vitality (A, B, C, D, F), anticipated construction impacts (clearance prune, TPZ encroach, relocate, fell), protective fencing (yes/no) and notes.

4. **Individual Tree Analysis**

The tree evaluation should address:

- 1) protected trees that are the subject of the request (or violation);
- 2) if development is proposed, all protected trees with TPZs within 20' of the limits of the construction area (including access roads and storage areas) of the proposed development; and
- 3) all protected trees with TPZs within 10' of the TPZ of other trees proposed for removal.

Include the approximate location of trees on adjacent parcels that meet these criteria if the TPZ extends over the property line of the subject parcel.

In addition to the tree characteristic/observation information that should be standard in arborist reports, the Planning Division requires that the following specific information be included:

Observations

- Indicate whether the tree is single- or multi-trunked (below 4.5').
- An explanation if girth measurements are taken at other than 4.5'.
- Indicate if the tree is of heritage size or potentially of historical status.
- Location of tree by tree number (in most cases trees must be field tagged). Description should include a distance measurement from a fixed landmark or structure.
- Health class of tree using the flowing rating system: A-excellent, B-average, C-fair, D-poor, F--dead/dying.
- Description of the TPZ, including any factors relevant to the tree's condition (e.g., natural grasses, steep terrain, existing roadway or structure, utility lines, drainage swales, evidence of grade changes, fire damage, etc.)
- If removal of a dead tree is part of the proposal, include a discussion about likely causes of death.
- If tree relocation is part of the proposal, include a statement about each tree's transplant viability.
- Indicate whether spread of disease or insects from the tree a concern, and if so any special disposal or handling requirements.
- Potential impacts to the tree and to the TPZ from the proposed project.

Tree-Specific Recommendations

- These shall be based upon the above impacts and the County's Tree Protection Ordinance. They include recommendations such as to irrigate a tree in drought conditions, remove materials from the TPZ, make a slope cut in a precise location, install a venting system under a driveway, sample diseased tissue, etc.
- If the tree removal or alteration is being requested to allow for reasonable use of property as allowed by the Zoning Ordinance, indicate whether tree modifications could alleviate conflicts with the tree or whether tree removal is warranted—such as when the tree will not survive the proposed land use/activity. If major pruning is recommended, provide specific information on the recommended pruning.

5. Appraisals

(For projects that require mitigation or offsets.)

Arborist Reports for discretionary projects must include tree appraisals for those trees, excluding hazardous or dead trees, that will be felled or transplanted or significantly impacted. Reports assessing tree-related violations must also include appraisals. Appraisals must be done using the most current edition of the *Guide for Plant Appraisal* (as it applies to Ventura County), published by the Council of Tree and Landscape Appraisers.

6. Discussion

Use this section for discussion of information not covered elsewhere.

7. Recommendations

Note: Do not include detailed recommendations in this section if a TPP is required. If a TPP will be prepared, this section should only list the issues that should be addressed in the TPP. See the Tree Protection Plan (TPP) section below. If a TPP will not be prepared, then this section should give a comprehensive treatment of recommendations, including the following. DO NOT include generic recommendations that may not apply.

- Recommendation on any immediate response that is needed for safety.
- Recommendation on whether TPZ fencing (and hence a TPP) or site supervision is warranted during construction. If no TPP will be prepared, detailed recommendations on tree care can be provided, otherwise the Arborist Report should simply mention the need for protective fencing and/or specific tree care (and the details will come later in the TPP).
- Recommendations about timing of any pruning or removal (e.g., to avoid nesting birds, sun scald, heat stress, etc.).
- Recommendations on tree care and injury prevention such as to irrigate a tree in drought conditions, remove materials from the TPZ, make a slope cut in a precise location, install a venting system under a driveway, sample diseased tissue, etc.
- If the Arborist Report is assessing the impact of a violation, include practical recommendations for onsite remediation and monitoring if applicable.
- If the tree removal or alteration is being requested to allow for reasonable use of property as allowed by the Zoning Ordinance, indicate whether tree modifications could alleviate conflicts with the tree and the development or whether tree removal is warranted—such as when the tree will not survive the proposed land use/activity. If major pruning is recommended, provide specific information on the recommended pruning.

8. Supporting Information

- 1 to 4 color photos per affected tree or stand—as needed to document the situation—are required. The photos should be taken from different vantage points, clearly illustrate the reason for the

request, and help locate the tree relative to nearby landmarks. Photos should also be taken of any tree whose TPZ may be impacted from proposed development or tree removal/alteration. Photo print outs are required. Digital photo files are requested.

- ❑ Site plan with numbered tree locations. Depict tree trunks and TPZs. The map should be at a scale of 1" = 30' or larger.

9. Tree Protection Plan (if required)

A Tree Protection Plan (TPP) is a plan, including both site plan illustrations and an associated narrative, which outlines specific measures to protect trees during construction or other site disturbance. The TPP also addresses, if applicable, measures to mitigate for impacts to protected trees, such as the transplanting or planting of replacement trees.

If a proposed discretionary project may cause damage to trees protected by the Ventura County Tree Protection Ordinance, a TPP must be submitted to and approved by the County prior to any clearing, grubbing, grading or other disturbance that may affect the health of protected trees.

A conceptual TPP may be included with the Arborist Report but it must stand alone as a separate document. The conceptual TPP may need to be modified based upon any modifications in the final, approved project plans. TPPs should include the information required per the County document *Content Requirements for Tree Protection Plans*.