



City Council
Mayor John W. Minto
Vice Mayor Rob McNelis
Council Member Ronn Hall
Council Member Laura Koval
Council Member Dustin Trotter

CITY OF SANTEE REGULAR MEETING AGENDA Santee City Council

City Manager | Marlene D. Best
City Attorney | Shawn D. Hagerty
City Clerk | Annette Fagan Ortiz

MEETING INFORMATION

Wednesday, October 27, 2021

6:30 p.m.

Council Chambers | Building 2

10601 Magnolia Ave • Santee, CA 92071

Staff

Assistant to the City Manager | Kathy Valverde
Community Services Director | Bill Maertz
Development Services Director | Melanie Kush
Finance Director/Treasurer | Tim McDermott
Fire & Life Safety Director/Fire Chief | John Garlow
Human Resources Director | Erica Hardy
Law Enforcement | Captain Christina Bavencoff

TO WATCH LIVE:

AT&T U-verse channel 99 (SD Market) | Cox channel 117 (SD County)

www.cityofsanteeca.gov

IN-PERSON ATTENDANCE

Please be advised that current public health orders require unvaccinated attendees to wear a face covering while inside the Council Chambers. If you enter the Council Chambers without a face covering, you are self-certifying that you have been vaccinated.

LIVE PUBLIC COMMENT

Members of the public who wish to comment on matters on the City Council agenda or during Non-Agenda Public Comment may appear in person and submit a speaker slip, before the item is called. Speakers must adhere to the public health order requirement to wear a face covering if unvaccinated. Your name will be called when it is time to speak.

PLEASE NOTE: Public Comment will be limited to 3 minutes and speaker slips will only be accepted until the item is called. The timer will begin when the participant begins speaking.



The City Council also sits as the Community Development Commission Successor Agency and the Santee Public Financing Authority. Any actions taken by these agencies are separate from the actions taken by City Council. For questions regarding this agenda, please contact the City Clerk's Office at (619) 258-4100 x114

ROLL CALL: Mayor John W. Minto
Vice Mayor Rob McNelis
Council Members Ronn Hall, Laura Koval, and Dustin Trotter

LEGISLATIVE INVOCATION: Terence Keehan – The Church of Jesus Christ of Latter-day Saints

PLEDGE OF ALLEGIANCE

PROCLAMATION: Recognition of Outstanding Community Support Displayed During and After the October 11 Plane Crash in Santee

CONSENT CALENDAR:

PLEASE NOTE: Consent Calendar items are considered routine and will be approved by one motion, with no separate discussion prior to voting. The public, staff or Council Members may request specific items be removed from the Consent Calendar for separate discussion or action. Speaker slips for this category must be presented to the City Clerk at the start of the meeting. Speakers are limited to 3 minutes.

- (1) **Approval of Reading by Title Only and Waiver of Reading in Full of Ordinances and Resolutions on the Agenda. (City Clerk – Ortiz)**
- (2) **Approval of Meeting Minutes of the Santee City Council for the October 13, 2021, Regular Meeting. (City Clerk – Ortiz)**
- (3) **Approval of Payment of Demands as Presented. (Finance – McDermott)**
- (4) **Approval of the Expenditure of \$79,520.10 for September 2021 Legal Services and Reimbursable Costs. (Finance – McDermott)**
- (5) **Draft Urban Forestry Management Plan. (Community Services – Maertz)**
- (6) **Second Reading and Adoption of an Ordinance Establishing an Automatic One-Year Extension for Active Development Approvals, Due to the Economic Impacts of the Novel Coronavirus (COVID-19). (City Clerk – Ortiz)**
- (7) **Resolution Approving an Amended Salary Schedule for Hourly, General and Management Employees. (Human Resources – Hardy)**



NON-AGENDA PUBLIC COMMENT (15 minutes):

Persons wishing to address the City Council regarding items not on the posted agenda may do so at this time. In accordance with State law, Council may not take action on an item not scheduled on the Agenda. If appropriate, the item will be referred to the City Manager or placed on a future agenda. This first Non-Agenda Public Comment period is limited to a total of 15 minutes. Additional Non-Agenda Public Comment is received prior to Council Reports.

CONTINUED BUSINESS:

- (8) Resolution Authorizing the City Manager to Execute a Professional Services Agreement with HMC Group dba HMC Architects for Architectural, Engineering, Landscape Architectural and Environmental Design Services for the Santee Community Center Project. (Community Services – Maertz)**

Recommendation:

Adopt Resolution authorizing the award of the contract for architectural, engineering, landscape architectural and environmental design services for a single-phase Community Center Project to HMC Group dba HMC Architects in an amount not to exceed \$1,150,000.00.

NEW BUSINESS:

- (9) Proposed Waiver of Building Permit Fees and Other Costs for Victims of the Small Plane Crash October 11, 2021. (City Manager – Best)**

Recommendation:

The City Council should consider the request and provide direction to staff on whether or not to waive costs for plane crash victims, and if so to what extent.

- (10) Presentation of a Proposed “Safe Santee” Program by the San Diego County Sheriff’s Department. (City Manager – Best)**

Recommendation:

Hear report and provide direction to staff.

- (11) Workshop to Consider a Request by Electric Scooter Company Bird to Enter into an Agreement with the City of Santee, California, to Operate Electric Scooters within the Public Right-Of-Way. (Development Services – Kush)**

Recommendation:

Receive staff report, conduct public workshop, and direct staff to prepare and enter into an agreement with Bird if City Council agrees to allow Bird, or other similar companies, to operate in Santee.

- (12) An Informational Workshop on the Potential for the City of Santee to Consider Electrification as One of the Measures to Reduce Greenhouse Gas Emissions and Achieve Carbon Neutrality Consistent with the State of California's Decarbonization Efforts. (Development Services – Kush)**

Recommendation:

Receive staff report and provide staff direction on the preparation of a draft ordinance, or wait for State code changes.

- (13) Resolution Reinstating the Vacation Cash Out Program. (Finance – McDermott)**

Recommendation:

Adopt the Resolution reinstating the Vacation Cash Out Program effective October 27, 2021.

NON-AGENDA PUBLIC COMMENT (Continued):

All public comment not presented within the first Non-Agenda Public Comment period above will be heard at this time.

CITY COUNCIL REPORTS:

CITY MANAGER REPORTS:

CITY ATTORNEY REPORTS:

CLOSED SESSION:

- (14) PUBLIC EMPLOYEE PERFORMANCE EVALUATION**

(Government Code Section 54957(b))

Title: City Clerk

- (15) Conference with Real Property Negotiators**

(Gov. Code §54956.8)

Property: Parcel 4 of Parcel Map 18857 located in Trolley Square

City Negotiator: City Manager

Negotiating Parties: Excel Hotel Group and Santee Trolley Square 991, LP

Under Negotiation: Price and terms of payment



- (16) Conference with Real Property Negotiators**
(Gov. Code §54956.8)
Property: 9811 Mission Gorge Rd (APN 384-041-01)
City Negotiator: City Manager
Negotiating Party: Orkin Inc.
Under negotiation: Price and terms of payment

ADJOURNMENT:



**BOARDS, COMMISSIONS & COMMITTEES
OCTOBER & NOVEMBER MEETINGS**

Oct	07	SPARC	Council Chamber
Oct	11	Community Oriented Policing Committee	Council Chamber
Oct	13	Council Meeting	Council Chamber
Oct	27	Council Meeting	Council Chamber
Nov	02	DEI Community Workshop	Council Chamber
Nov	04	SPARC	Council Chamber
Nov	08	Community Oriented Policing Committee	Council Chamber
Nov	10	Council Meeting	Council Chamber

The Santee City Council welcomes you and encourages your continued interest and involvement in the City's decision-making process.

For your convenience, a complete Agenda Packet is available for public review at City Hall and on the City's website at www.CityofSanteeCA.gov.

The City of Santee complies with the Americans with Disabilities Act. Upon request, this agenda will be made available in appropriate alternative formats to persons with disabilities, as required by Section 12132 of the American with Disabilities Act of 1990 (42 USC § 12132). Any person with a disability who requires a modification or accommodation in order to participate in a meeting should direct such request to the City Clerk's Office at (619) 258-4100, ext. 112 at least 48 hours before the meeting, if possible.

MEETING DATE October 27, 2021

ITEM TITLE **RECOGNITION OF OUTSTANDING COMMUNITY SUPPORT
DISPLAYED DURING AND AFTER THE OCTOBER 11 PLANE CRASH IN SANTEE**

DIRECTOR/DEPARTMENT John W. Minto, Mayor

SUMMARY

The Mayor, City Council and Staff of the City of Santee are extremely saddened by the plane crash that occurred in our community on Monday October 11, 2021. Our deepest and most heartfelt condolences go out to the family and friends of the victims who tragically lost their lives, and are extending all the support that we can for those who were injured, lost homes, or suffered property damage in this incident.

Santee is sincerely grateful to the first responders and partnering agencies who assisted at the scene to manage this incident and protect the life and property of others as much as possible. The Heartland Communications team that worked the incident did a great job and are deserving of recognition. Heartland Communications Authority Commissioner Laura Koval will present a proclamation in honor of their outstanding efforts.

This is not the first tragedy the Santee community has faced, and the brave nature and exceptional caliber of the people who live in our city continues to shine. This was an absolute example of neighbors helping neighbors, and community members helping in the immediate aftermath of the crash. Several such community members are deserving of recognition for their heroic actions. Certificates of Commendation have been prepared to honor these citizens.

We will never forget this tragic accident or the victims, and we know the Santee community will continue to come together to support the residents who lost their homes and rebuild our community.

FINANCIAL STATEMENT

N/A

CITY ATTORNEY REVIEW N/A Completed

RECOMMENDATION

MSB
Present proclamation to Heartland Communications staff members and present certificates to the citizens who helped in the immediate aftermath of the accident.



MEETING DATE October 27, 2021

ITEM TITLE APPROVAL OF READING BY TITLE ONLY AND WAIVER OF READING IN FULL OF ORDINANCES AND RESOLUTIONS ON THE AGENDA.

DIRECTOR/DEPARTMENT Annette Ortiz, CMC, City Clerk

SUMMARY

This Item asks the City Council to waive the reading in full of all Ordinances on the Agenda (if any) and approve their reading by title only. The purpose of this Item is to help streamline the City Council meeting process, to avoid unnecessary delay and to allow more time for substantive discussion of Items on the agenda.

State law requires that all Ordinances be read in full either at the time of introduction or at the time of passage, unless a motion waiving further reading is adopted by a majority of the City Council. (Gov. Code, § 36934). This means that each word in each Ordinance would have to be read aloud unless such reading is waived. Such reading could substantially delay the meeting and limit the time available for discussion of substantive Items. Adoption of this waiver streamlines the procedure for adopting the Ordinances on tonight's Agenda (if any), because it allows the City Council to approve Ordinances by reading aloud only the title of the Ordinance instead of reading aloud every word of the Ordinance.

The procedures for adopting Resolutions are not as strict as the procedures for adopting Ordinances. For example, Resolutions do not require two readings for passage, need not be read in full or even by title, are effective immediately unless otherwise specified, do not need to be in any particular format unless expressly required, and, with the exception of fixing tax rates or revenue amounts, do not require publication. However, like Ordinances, all Resolutions require a recorded majority vote of the total membership of the City Council. (Gov. Code § 36936).

FINANCIAL STATEMENT

CITY ATTORNEY REVIEW N/A Completed

RECOMMENDATION

It is recommended that the Council waive the reading of all Ordinances and Resolutions in their entirety and read by title only.

ATTACHMENT

None



MEETING DATE October 27, 2021

ITEM TITLE APPROVAL OF MEETING MINUTES OF THE SANTEE CITY COUNCIL FOR THE OCTOBER 13, 2021 REGULAR MEETING.

DIRECTOR/DEPARTMENT Annette Ortiz, CMC, City Clerk

SUMMARY

Submitted for your consideration and approval are the minutes of the above meeting.

FINANCIAL STATEMENT

N/A

CITY ATTORNEY REVIEW N/A Completed

RECOMMENDATION

Approve Minutes as presented.

ATTACHMENT

Regular Meeting Minutes

- October 13, 2021

DRAFT

**Minutes
Santee City Council
Council Chamber – Building 2
10601 Magnolia Avenue
Santee, California
October 13, 2021**

This Regular Meeting of the Santee City Council was called to order by Mayor John W. Minto at 6:36 p.m.

ROLL CALL: Present: Mayor John W. Minto and Council Members Ronn Hall, Laura Koval and Dustin Trotter – 4. Absent: Vice Mayor Rob McNelis – 1.

Officers present: City Manager Marlene Best, City Attorney Shawn Hagerty, and City Clerk Annette Ortiz

INVOCATION was given by Pastor Marshall Masser – Lakeside Christian Church

PLEDGE OF ALLEGIANCE was led by Council Member Hall

PROCLAMATION: Teacher of the Year – Tiffany Jokerst, West Hills High School

Mayor Minto read the Proclamation.

ADJOURNMENT IN MEMORY: Sidney Walton

Mayor Minto spoke about Sidney Walton.

CONSENT CALENDAR:

- (1) **Approval of Reading by Title Only and Waiver of Reading in Full of Ordinances and Resolutions on the Agenda. (City Clerk – Ortiz)**
- (2) **Approval of Meeting Minutes of the Santee City Council for the September 8, 2021, Regular Meeting. (City Clerk – Ortiz)**
- (3) **Approval of Payment of Demands as Presented. (Finance – McDermott)**
- (4) **Purchase of One New X Series EKG Monitor/Defibrillator and Related Equipment and Supplies from Zoll Medical Corporation in an Amount Not to Exceed \$35,180.88. (Fire – Garlow)**
- (5) **Claim Against the City by Ida Logan. (Human Resources – Hardy)**
- (6) **Adoption of a Resolution Awarding the Construction Contract for the City Hall Trash Enclosure Modifications Project (CIP 2018-52) and**

Determining a Categorical Exemption Pursuant to Section 15301(e) of the California Environmental Quality Act with a Total Anticipated Project Cost of \$73,150.00. (Development Services – Kush) (Reso 085-2021)

- (7) **Adoption of a Resolution Awarding the Construction Contract for the San Diego River Trail Improvements, Walmart to Cuyamaca Street Project (CIP 2020-42) to HSCC, Inc., Determining a Categorical Exemption Pursuant to Section 15301(d) of the California Environmental Quality Act and Appropriating General Funds for a Total Project Budget of \$169,945.00. (Development Services – Kush) (Reso 086-2021)**

ACTION: Council Member Hall moved approval of the Consent Calendar.

Council Member Koval seconded the motion, which carried by the following roll call vote: Mayor Minto: Aye; and Council Members Hall: Aye; Koval: Aye; and Trotter: Aye. Ayes: 4. Noes: 0. Absent: Vice Mayor McNelis – 1.

NON-AGENDA PUBLIC COMMENT (15 minutes):

None.

PUBLIC HEARING:

- (8) **CDBG Annual Action Plan Amendment for Program Year 2021. (Development Services – Kush) THIS PUBLIC HEARING ITEM WAS CANCELLED.**

Mayor Minto announced this Item has been cancelled.

- (9) **Redrawing of City Council Member District Boundaries. (City Clerk – Ortiz)**

The Public Hearing was opened at 7:00 p.m. The City Clerk introduced the Item and Stephanie Smith, Best, Best and Krieger, provided a PowerPoint presentation and responded to Council questions.

PUBLIC SPEAKERS:

- Dan Bickford
- Michael Ranson

The Public Hearing was closed at 7:26 p.m.

The Council recessed at 7:26 p.m. and reconvened at 7:37 p.m.

CONTINUED BUSINESS:**(10) Cannabis Workshop No. 3. (City Manager – Best)**

The City Manager introduced the Item and the Finance Director, the Associate Planner and Ajay Kolluri, HdL Companies provided a PowerPoint presentation and responded to Council questions.

PUBLIC SPEAKERS:

- Terry
- Kathleen Lippitt, Coastal Communities Drug Free Coalition
- Tenaya Webb
- Karen
- Brittany Biesterfeld, Austin Legal Group
- Paul Bertram
- Erik Wiese
- Vito Morero
- Tim Dickey
- Elijah Gerak
- Cameron Pittman
- Michael Ybarra

The Council unanimously directed staff to bring back more data at future workshops.

NEW BUSINESS:**(11) Adoption of Urgency Ordinance and Introduction of Non-Urgency Ordinance Establishing an Automatic One-Year Extension for Active Development Approvals, Due to the Economic Impacts of the Novel Coronavirus (COVID-19), and Setting Forth the Facts Constituting Such Urgency. (City Manager – Best) (Ord 593)**

Mayor Minto read the Item title.

ACTION: Council Member Hall moved approval of staff recommendation.

Council Member Koval seconded the motion, which carried by the following vote: Mayor Minto: Aye; and Council Members Hall: Aye; Koval: Aye; and Trotter: Aye. Ayes: 4. Noes: 0. Absent: Vice Mayor McNelis – 1.

(12) Authorize the City Manager to Execute a Professional Services Agreement with Fehr and Peers to Develop the Guidelines for Implementing Senate Bill (SB) 743 for the City of Santee. (Development Services – Kush)

Mayor Minto read the Item title.

ACTION: Council Member Koval moved approval of staff recommendation.

Council Member Hall seconded the motion, which carried by the following vote: Mayor Minto: Aye; and Council Members Hall: Aye; Koval: Aye; and Trotter: Aye. Ayes: 4. Noes: 0. Absent: Vice Mayor McNelis – 1.

NON-AGENDA PUBLIC COMMENT: (Continued)

None.

CITY COUNCIL REPORTS:

Council Member Hall requested assistance for the plane crash victims.

Council Member Trotter mentioned the West Hills versus Santana High School Santee Cup.

Mayor Minto reported on the League of California Cities conference that he attended along with the City Clerk and City Manager.

CITY MANAGER REPORTS:

The City Manager thanked the staff and first responders for their work with the plane crash event; she also mentioned the Brews and Bite's event.

CITY ATTORNEY REPORTS:

None.

CLOSED SESSION:

Council Members recessed at 9:19 p.m. and convened in Closed Session at 9:24 p.m.

(13) Conference with Legal Counsel – Existing Litigation

(Gov. Code §54956.9(d)(1))

Name of case: Santee Trolley Square 991, LP v. City of Santee et al.

Case Number: San Diego Superior Court Case No. 37-2020-00007895-CU-WM-CTL

(14) Conference with Legal Counsel – Existing Litigation

(Gov. Code §54956.9(d)(1))

Name of case: Preserve Wild Santee et al. v. City of Santee et al.

Case Number: San Diego Superior Court Case No. 37-2020-00038168-CU-WM-CTL

(15) Conference with Real Property Negotiators

(Gov. Code §54956.8)

Property: Parcel 4 of Parcel Map 18857 located in Trolley Square

City Negotiator: City Manager

Negotiating Parties: Excel Hotel Group and Santee Trolley Square 991, LP

Under Negotiation: Price and terms of payment

Council Members reconvened in Open Session at 9:44 p.m. with all members present, except Vice Mayor McNelis, who was absent. Mayor Minto reported no reportable actions taken on Items 13, 14 and 15.

ADJOURNMENT:

There being no further business, the meeting was adjourned in memory of Sidney Walton at 9:45 p.m.

Date Approved:

Annette Ortiz, CMC, City Clerk

MEETING DATE October 27, 2021

ITEM TITLE PAYMENT OF DEMANDS

DIRECTOR/DEPARTMENT Tim K. McDermott, Finance *TKM*

SUMMARY

A listing of checks that have been disbursed since the last Council meeting is submitted herewith for approval by the City Council.

FINANCIAL STATEMENT *TKM*

Adequate budgeted funds are available for the Payment of Demands per the attached listing.

CITY ATTORNEY REVIEW N/A Completed

RECOMMENDATION *MSB*

Approve the Payment of Demands as presented.

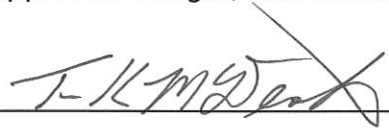
ATTACHMENT

- 1) Summary of Payments Issued
- 2) Voucher Lists

Payment of Demands
Summary of Payments Issued

<u>Date</u>	<u>Description</u>	<u>Amount</u>
10/01/2021	Accounts Payable	\$ 998.73
10/7/2021	Payroll	392,055.90
10/07/2021	Accounts Payable	220,297.46
10/07/2021	Accounts Payable	311,369.27
10/8/2021	Accounts Payable	117,570.60
10/11/2021	Accounts Payable	43,291.44
10/13/2021	Accounts Payable	121,698.60
10/14/2021	Accounts Payable	<u>1,268,515.27</u>
	TOTAL	<u>\$2,475,797.27</u>

I hereby certify to the best of my knowledge and belief that the foregoing demands listing is correct, just, conforms to the approved budget, and funds are available to pay said demands.



Tim K. McDermott, Director of Finance

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
1009	10/1/2021	12774 LIABILITY CLAIMS ACCOUNT	09302021		LIABILTY CLAIMS	998.73

Total : 998.73

1 Vouchers for bank code : ubgen

Bank total : 998.73

1 Vouchers in this report

Total vouchers : 998.73

Prepared by: Isabel Sundland

Date: 10/07/2021

Approved by: Heather Jennings

Date: 10/7/21

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128607	10/7/2021	12724 AMERICAN FIDELITY ASSURANCE	D364665		VOLUNTARY INS-AM FIDELITY	5,024.64
					Total :	5,024.64
128608	10/7/2021	12903 AMERICAN FIDELITY ASSURANCE CO	6012662A		FLEXIBLE SPENDING ACCOUNT	2,440.76
					Total :	2,440.76
128609	10/7/2021	10208 ANTHEM EAP	81092		EMPLOYEE ASSISTANCE PROGRAI	284.16
					Total :	284.16
128610	10/7/2021	10334 CHLIC	2893459		HEALTH/DENTAL INSURANCE	207,904.82
					Total :	207,904.82
128611	10/7/2021	10785 RELIANCE STANDARD LIFE	October 21		VOLUNTARY LIFE INSURANCE	657.67
					Total :	657.67
128612	10/7/2021	10424 SANTEE FIREFIGHTERS	PPE 09/29/21		DUES/PEC/BENEVOLENT/BC EXP	3,027.49
					Total :	3,027.49
128613	10/7/2021	10776 STATE OF CALIFORNIA	PPE 09/29/21		WITHHOLDING ORDER	308.30
					Total :	308.30
128614	10/7/2021	10001 US BANK	PPE 09/29/21		PARS RETIREMENT	649.62
					Total :	649.62
8 Vouchers for bank code : ubgen						Bank total : 220,297.46
8 Vouchers in this report						Total vouchers : 220,297.46

Prepared by: Isabel Smedland
 Date: 10/07/2021
 Approved by: Heather Jennings
 Date: 10/7/21

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128615	10/7/2021	10128 AAIR PURIFICATION SYSTEMS	23002	53593	VEHICLE REPAIR PART	1,727.77
					Total :	1,727.77
128616	10/7/2021	10412 AT&T	0000170777403		TELEPHONE	814.11
					Total :	814.11
128617	10/7/2021	10412 AT&T	301053963-OCT 2021		MAST PARK	90.95
					Total :	90.95
128618	10/7/2021	10262 AUSTIN, ROY	10012021		RETIREE HEALTH INSURANCE	1,412.10
					Total :	1,412.10
128619	10/7/2021	10533 AVENU MUNISERVICES	INV06-012519	53514	ACFR - STATISTICAL REPORT	1,700.00
					Total :	1,700.00
128620	10/7/2021	11748 BAGLEY, AARON	07092021		TUITION REIMBURSEMENT	1,230.00
					Total :	1,230.00
128621	10/7/2021	13292 BORDER TIRE	8024803 8025349	53406 53406	TIRES TIRE REPAIR	1,693.89 177.47
					Total :	1,871.36
128622	10/7/2021	12189 BROWN, MATTHEW	091121		EMPLOYEE REIMBURSEMENT	250.00
					Total :	250.00
128623	10/7/2021	10299 CARQUEST AUTO PARTS	11102-537672 11102-538002	53407 53407	VEHICLE SUPPLIES VEHICLE REPAIR PARTS	33.92 51.59
					Total :	85.51
128624	10/7/2021	10032 CINTAS CORPORATION #694	4095830967	53483	UNIFORM/PARTS CLEANER RENTA	62.48
					Total :	62.48
128625	10/7/2021	10486 COUNTY OF SAN DIEGO	09292021		COUNTY RECORDER FEE - NOE	50.00
					Total :	50.00
128626	10/7/2021	10333 COX COMMUNICATIONS	052335901-SEPT 21		8950 COTTONWOOD AVE	185.89

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128626	10/7/2021	10333 10333 COX COMMUNICATIONS	(Continued)			Total : 185.89
128627	10/7/2021	10058 ETS PRODUCTIONS INC	21047	53494	BREWS AND BITES	1,800.00
						Total : 1,800.00
128628	10/7/2021	14348 FIRSTWATCH SOLUTIONS, INC	FW108316	53601	SOFTWARE SUBSCRIPTION	600.00
						Total : 600.00
128629	10/7/2021	14221 GONDOLA SKATE	BC20001A		REFUNDABLE DEPOSITS BC20001,	98.04
						Total : 98.04
128630	10/7/2021	11550 HUISMAN, AARON	10032021		RIVER COMPLEX FIRE	493.25
						Total : 493.25
128631	10/7/2021	10272 JENKINS, CARROLL	10012020		RETIREE HEALTH INSURANCE	3,101.22
						Total : 3,101.22
128632	10/7/2021	13247 JOHNSON, DOUGLAS	10012021		RETIREE HEALTH INSURANCE	891.00
						Total : 891.00
128633	10/7/2021	10997 LAKESIDE FIRE PREVENTION	200	53511	SOFTWARE SUBSCRIPTION	1,644.00
						Total : 1,644.00
128634	10/7/2021	10204 LIFE ASSIST INC	1117717	53477	EMS SUPPLIES	623.15
			1131229	53477	EMS SUPPLIES	4,848.35
						Total : 5,471.50
128635	10/7/2021	14373 LINDE, ALEXANDRE	091521		EMPLOYEE REIMBURSEMENT	250.00
						Total : 250.00
128636	10/7/2021	10174 LN CURTIS AND SONS	INV508848	53453	SAFETY APPAREL	263.18
						Total : 263.18
128637	10/7/2021	10079 MEDICO HEALTHCARE LINEN	20470886	53546	MEDICAL LINEN SERVICE	20.62
			20470888	53546	MEDICAL LINEN SERVICE	13.01
						Total : 33.63
128638	10/7/2021	14208 MINUTEMAN PRESS EL CAJON	62940	53586	BUSINESS CARDS	137.34

Voucher List
CITY OF SANTEE

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128638	10/7/2021	14208	14208 MINUTEMAN PRESS EL CAJON		(Continued)	Total : 137.34
128639	10/7/2021	10507	MITEL LEASING		903309885 MITEL LEASING -126670 SEP 2021	1,878.80
					903352184 MONTHLY RENTAL 122670 OCT 202	1,878.80
					903352209 MONTHLY RENTAL 124690 OCT 202	312.66
					903352256 MONTHLY RENTAL 131413 OCT 20:	266.16
					Total :	4,336.42
128640	10/7/2021	10155	MUSCO SPORTS LIGHTING LLC	354248	53628 MUSCO LIGHTS	900.00
					Total :	900.00
128641	10/7/2021	10218	OFFICE DEPOT	193050923001	53547 OFFICE SUPPLIES - DDS	443.71
					Total :	443.71
128642	10/7/2021	10308	O'REILLY AUTO PARTS	2968-437720	53458 VEHICLE SUPPLIES	8.18
					Total :	8.18
128643	10/7/2021	10932	PERRY ELECTRIC	1319-2	53562 TRAFFIC SIGNAL VISIBILITY PROJE	76,045.00
				1319-2R	RETENTION	-3,802.25
					Total :	72,242.75
128644	10/7/2021	10241	PETTY CASH	09142021	PETTY CASH REIMB - CSD	156.02
					Total :	156.02
128645	10/7/2021	10791	RECON ENVIRONMENTAL INC	64552	53341 SANTEE GP AMEND & ZONE CHAN	5,495.25
					Total :	5,495.25
128646	10/7/2021	10936	SAFECHECKS	0540570	53597 SAFECHECKS - AP FINANCE	965.30
					Total :	965.30
128647	10/7/2021	10407	SAN DIEGO GAS & ELECTRIC	0422 970 321 8 -SEPT	STREET LIGHTS	36,125.88
				2237 358 004 2-SEPT	TRAFFIC SIGNALS-SEPT 2021	5,347.09
				8509 742 169 4-SEPT	CITY HALL GROUP BILL-SEPT 2021	12,205.27
					Total :	53,678.24
128648	10/7/2021	10407	SAN DIEGO GAS & ELECTRIC	0043940205509-SEPT	GROUP BILL CYCLE 12	6,126.96
					Total :	6,126.96

Voucher List
CITY OF SANTEE

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128649	10/7/2021	13171 SC COMMERCIAL, LLC	1954934-IN 1957099-IN	53480 53480	DELIVERED FUEL DELIVERED FUEL	653.10 928.28 Total : 1,581.38
128650	10/7/2021	13554 SC FUELS	0440792-DEF 0440792-F	53488 53481	DIESEL EXHAUST FLUID (DEF) FLEET CARD FUELING	11.09 2,207.22 Total : 2,218.31
128651	10/7/2021	13206 SHARP BUSINESS SYSTEMS	9003459476	53579	SHARP COPIES/MAINT 09/2021	932.80 Total : 932.80
128652	10/7/2021	10217 STAPLES ADVANTAGE	3486018579 348692821 3486928210 3487093840	53467 53467 53548 53548	STAPLES CREDIT FOR ITEM RETU OFFICE SUPPLIES OFFICE SUPPLIES - DDS OFFICE SUPPLIES - DDS	-6.13 39.74 10.55 50.21 Total : 94.37
128653	10/7/2021	14368 STRAIGHT SIX	00000031	53610	BREWS AND BITES	500.00 Total : 500.00
128654	10/7/2021	10250 THE EAST COUNTY	00109985		NOTICE OF PUBLIC HEARING - CDI	199.50 Total : 199.50
128655	10/7/2021	10165 TRAD AM ENTERPRISES INC	522		INTSTRUCTOR PAYMENT	417.00 Total : 417.00
128656	10/7/2021	12528 VALVERDE, KATHY	091321		TRAVEL REIMBURSEMENT	110.41 Total : 110.41
128657	10/7/2021	10475 VERIZON WIRELESS	9885989503-A 9888162819 9888162820		WIFI SERVICE CELL PHONE SERVICE-SEPT 2021 WIFI SERVICE	185.92 1,203.63 1,061.74 Total : 2,451.29
128658	10/7/2021	10136 WEST COAST ARBORISTS INC	174975 175762 175798 176433	53503 53503 53503 53503	URBAN FORESTRY MANAGEMENT URBAN FORESTRY SVCS URBAN FORESTRY MANAGEMENT URBAN FORESTRY MANAGEMENT	7,262.40 854.40 47,079.55 295.00

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128658	10/7/2021	10136	10136 WEST COAST ARBORISTS INC	(Continued)		Total : 55,491.35
128659	10/7/2021	13996	WESTERN AUDIO VISUAL	6	53179 CITY COUNCIL CHAMBER A/V UPGI	76,560.24
			6R		RETENTION	-3,828.01
					Total :	72,732.23
128660	10/7/2021	14281	WYATT W. UNDERWOOD &, ASSOCIATES 190329	53390	SHADOW HILL PLAY SURFACE REF	5,079.42
					Total :	5,079.42
128661	10/7/2021	10232	XEROX CORPORATION	014263161	53540 COPIER LEASE & CHARGES-PSD	318.10
				014263162	53577 XEROX FS#4 AUGUST 2021	318.10
				014263163	53541 XEROX FS #5 AUGUST 2021	308.85
					Total :	945.05
47 Vouchers for bank code : ubgen						Bank total : 311,369.27
47 Vouchers in this report						Total vouchers : 311,369.27

Prepared by: KSUBEL Smdan
Date: 10/07/2021
Approved by: Heather Jennings
Date: 10/7/21

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
62693	10/8/2021	10955 DEPARTMENT OF THE TREASURY	October 21 Retirees PPE 09/29/21		FEDERAL WITHHOLDING TAX FED WITHHOLD & MEDICARE	211.00 87,559.23
						Total : 87,770.23
62731	10/8/2021	10956 FRANCHISE TAX BOARD	October 21 Retirees PPE 09/29/21		CA STATE TAX WITHHELD CA STATE TAX WITHHELD	46.00 29,754.37
						Total : 29,800.37
2 Vouchers for bank code : ubgen						Bank total : 117,570.60
2 Vouchers in this report						Total vouchers : 117,570.60

Prepared by: Isabel Smelal
Date: 10/08/2021
Approved by: Nathaniel Jennings
Date: 10/18/21

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
618301	10/11/2021	10959 VANTAGE TRANSFER AGENT/457	PPE 09/29/21		ICMA - 457	34,832.73
					Total :	34,832.73
618302	10/11/2021	10782 VANTAGEPOINT TRNSFR AGT/801801	PPE 09/29/21		RETIREE HSA	8,458.71
					Total :	8,458.71
2 Vouchers for bank code : ubgen						Bank total : 43,291.44
2 Vouchers in this report						Total vouchers : 43,291.44

Prepared by: SARAH SANDERSON
Date: 10/12/2021
Approved by: STEPHEN JENNINGS
Date: 10/12/21

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
9215	10/13/2021	10353 PERS	09 21 5		RETIREMENT PAYMENT	121,698.60
Total :						121,698.60
1 Vouchers for bank code : ubgen						Bank total : 121,698.60
1 Vouchers in this report						Total vouchers : 121,698.60

Prepared by: *[Signature]*
Date: 10/13/2021
Approved by: *[Signature]*
Date: 10/13/21

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128662	10/14/2021	13456 AGRICULTURAL PEST CONTROL	600512 607044	53491 53491	PEST CONTROL SERVICES PEST CONTROL SERVICES	595.00 125.00 Total : 720.00
128663	10/14/2021	10591 BLX GROUP LLC	41612-14873/090921		TAX ALLOCATION BONDS, 2016 SEI	4,500.00 Total : 4,500.00
128664	10/14/2021	13292 BORDER TIRE	15003298 8025462	53406 53406	TIRE REPAIR TIRES	224.96 142.77 Total : 367.73
128665	10/14/2021	10668 CALIFORNIA BUILDING STANDARDS	JULY-SEPT 2021		1ST QTR JULY-SEPT SB1473 FEES	621.00 Total : 621.00
128666	10/14/2021	10299 CARQUEST AUTO PARTS	11102-538296	53407	VEHICLE REPAIR PARTS	189.31 Total : 189.31
128667	10/14/2021	12349 CHOICE LOCKSMITHING	083021CH	53521	LOCKSMITH SERVICES	378.99 Total : 378.99
128668	10/14/2021	10032 CINTAS CORPORATION #694	4096514693	53483	UNIFORM/PARTS CLEANER RNTL	62.48 Total : 62.48
128669	10/14/2021	12328 CINTAS CORP. #2	5075514937	53557	FIRST-AID KIT SERVICE	249.48 Total : 249.48
128670	10/14/2021	10486 COUNTY OF SAN DIEGO	10132021		COUNTY RECORDER FEE- NOE	50.00 Total : 50.00
128671	10/14/2021	10040 COUNTYWIDE MECHANICAL SYSTEMS	43662	53436	HVAC MAINT & REPAIRS	723.95 Total : 723.95
128672	10/14/2021	10036 CPS HR CONSULTING	121461		CPS HR CONSULTING	25.00 Total : 25.00
128673	10/14/2021	11418 DAMOOR, KESHAV	09162021KD		COMMISSION STIPEND	50.00

Voucher List
CITY OF SANTEE

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128673	10/14/2021	11418 11418 DAMOOR, KESHAV	(Continued)			Total : 50.00
128674	10/14/2021	10433 DEPARTMENT OF CONSERVATION	JULY-SEPT 2021		1ST QTR JULY-SEPT SMIP FEES	2,051.51
						Total : 2,051.51
128675	10/14/2021	13275 DOCHTERMAN, LINDA	09162021LD		COMMISSION STIPEND	50.00
						Total : 50.00
128676	10/14/2021	10202 FURTADO, DANIEL	416796		EMPLOYEE REIMBURSEMENT	200.00
						Total : 200.00
128677	10/14/2021	13274 GRANBOIS, DARCY	09162021DG		COMMISSION STIPEND	50.00
						Total : 50.00
128678	10/14/2021	14321 GREATMATS.COM CORPORATION	1620788	53524	DISC GOLF COURSE TEE BOX MAT	2,403.23
						Total : 2,403.23
128679	10/14/2021	10070 HAWTHORNE CAT MACHINERY	20885701	53525	EQUIPMENT RENTAL	165.36
						Total : 165.36
128680	10/14/2021	11196 HD SUPPLY FM	9195496134	53409	STATION SUPPLIES	19.22
						Total : 19.22
128681	10/14/2021	10256 HOME DEPOT CREDIT SERVICES	0673-00097-37198	53410	VEHICLE SUPPLIES	26.94
						Total : 26.94
128682	10/14/2021	11724 ICF JONES & STOKES INC	0157927	53609	MSCP SUBAREA PLAN	11,272.50
						Total : 11,272.50
128683	10/14/2021	14229 JOBSITE SUPPLY CO	68965200	53517	SAFETY EQUIPMENT & SUPPLIES	133.14
						Total : 133.14
128684	10/14/2021	13558 KIFER HYDRAULICS CO, INC	69662	53450	VEHICLE REPAIR	17.10
						Total : 17.10
128685	10/14/2021	10204 LIFE ASSIST INC	1135696	53477	EMS SUPPLIES	403.17
			1135781	53477	EMS SUPPLIES	2,566.82
						Total : 2,969.99

Voucher List
CITY OF SANTEE

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128686	10/14/2021	10079 MEDICO HEALTHCARE LINEN	20474759	53546	MEDICAL LINEN SERVICE	20.62
			20474761	53546	MEDICAL LINEN SERVICE	13.01
					Total :	33.63
128687	10/14/2021	14208 MINUTEMAN PRESS EL CAJON	62831	53586	BUSINESS CARDS	45.78
					Total :	45.78
128688	10/14/2021	10083 MUNICIPAL EMERGENCY SERVICES	IN1620578	53519	SAFETY APPAREL	16,792.19
			IN1621380	53455	FIREFIGHTING SUPPLIES	779.03
					Total :	17,571.22
128689	10/14/2021	10344 PADRE DAM MUNICIPAL WATER DIST	29700016-092021		CONSTRUCTION METER SEPT 202	239.07
					Total :	239.07
128690	10/14/2021	12904 PAT DAVIS DESIGN GROUP, INC	6642	53460	GRAPHIC DESIGN WORK	1,875.00
					Total :	1,875.00
128691	10/14/2021	14266 PATCH, LILI	09162021LP		COMMISSION STIPEND	50.00
					Total :	50.00
128692	10/14/2021	10092 PHOENIX GROUP INFO SYSTEMS	082021031	53605	PARKING CITE PROCESS SVCS	651.65
					Total :	651.65
128693	10/14/2021	12062 PURETEC INDUSTRIAL WATER	1913009	53558	DEIONIZED WATER SERVICE	109.38
					Total :	109.38
128694	10/14/2021	11830 RANCH EVENTS	E42106-B	53617	BREWS & BITES	3,385.60
					Total :	3,385.60
128695	10/14/2021	12994 RINCON CONSULTANTS, INC	33523	53171	FANITA RANCH PHASE II CULTURA	805.00
					Total :	805.00
128696	10/14/2021	10097 ROMAINE ELECTRIC CORPORATION	12-054238	53413	VEHICLE REPAIR	1,106.38
			12-054289	53413	VEHICLE REPAIR PARTS	405.78
					Total :	1,512.16
128697	10/14/2021	14308 ROSSI, VINCENT	1030		SENIOR PROGRAM PRESENTATIO	75.00

Voucher List
CITY OF SANTEE

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128697	10/14/2021	14308 14308 ROSSI, VINCENT	(Continued)			Total : 75.00
128698	10/14/2021	13455 ROTO-ROOTER	13141	53499	PLUMBING	1,495.01
			13592	53499	PLUMBING	1,950.00
			14093	53499	PLUMBING	155.00
			14199	53499	PLUMBING	125.00
			14200	53499	PLUMBING	231.56
			14390	53499	PLUMBING	155.00
					Total :	4,111.57
128699	10/14/2021	10407 SAN DIEGO GAS & ELECTRIC	79900685777- OCT 21		PARKS- OCTOBE2021	26,084.37
					Total :	26,084.37
128700	10/14/2021	11594 SAN DIEGO METROPOLITAN TRANSIT	1255		RACEWALK	750.00
					Total :	750.00
128701	10/14/2021	10768 SANTEE SCHOOL DISTRICT	9101	53500	JOINT USE FIELDS - RIO SECO	447.11
			9102	53500	JOINT USE FIELDS - RIO SECO	786.95
					Total :	1,234.06
128702	10/14/2021	13171 SC COMMERCIAL, LLC	1960556-IN	53480	DELIVERED FUEL	493.72
			1962895-IN	53480	DELIVERED FUEL	292.12
					Total :	785.84
128703	10/14/2021	13554 SC FUELS	0446039-DEF	53488	DIESEL EXHAUST FLUID (DEF)	5.84
			0446039-F	53481	FLEET CARD FUELING	2,233.75
					Total :	2,239.59
128704	10/14/2021	13206 SHARP ELECTRONICS CORPORATION	12904672	53604	SHARP MFP PURCHASE FS#4	210.11
					Total :	210.11
128705	10/14/2021	12223 SITEONELANDSCAPE SUPPLY LLC	112111205-001	53550	IRRIGATION SUPPLIES	405.65
			112129356-001	53550	IRRIGATION SUPPLIES	149.22
			112397856-001	53550	IRRIGATION SUPPLIES	113.87
			112400832-001	53550	IRRIGATION SUPPLIES	43.98
			112535675-001	53550	IRRIGATION SUPPLIES	208.73
			112656331-001	53550	IRRIGATION SUPPLIES	137.59
			112761518-001	53603	IRRIGATION PARTS	118.07

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128705	10/14/2021	12223 12223 SITEONE LANDSCAPE SUPPLY LLC	(Continued)			Total : 1,177.11
128706	10/14/2021	12223 SITEONE LANDSCAPE SUPPLY LLC	112938427-001	53603	IRRIGATION PARTS	141.87
						Total : 141.87
128707	10/14/2021	10837 SOUTHWEST TRAFFIC SIGNAL	81186 81187	53587 53587	USA MARKOUTS TRAFFIC SIGNAL SERVICE CALLS	244.08 4,426.84
						Total : 4,670.92
128708	10/14/2021	11341 SRM CONTRACTING & PAVING	2P 2P-R	53490	CITYWIDE PAVEMENT REPAIR AND RETENTION	1,145,621.25 -57,281.06
						Total : 1,088,340.19
128709	10/14/2021	10217 STAPLES ADVANTAGE	3487397306 3487397307 3487397308	53631 53467 53467	OFFICE SUPPLIES STAPLES OFFICE SUPPLIES STAPLES OFFICE SUPPLY	171.63 37.27 61.46
						Total : 270.36
128710	10/14/2021	13019 STATEWIDE TRAFFIC SAFETY	01007226	53535	TRAFFIC SIGNS	107.75
						Total : 107.75
128711	10/14/2021	10119 STEVEN SMITH LANDSCAPE INC	47852 47853 47854	53417 53418 53502	A1 LANDSCAPE SERVICES A2 LANDSCAPE SERVICES A3 LANDSCAPE SERVICES	50,836.25 18,652.79 11,447.56
						Total : 80,936.60
128712	10/14/2021	10250 THE EAST COUNTY	0010996	53574	CLERK OFFICE PUBLICATIONS	182.00
						Total : 182.00
128713	10/14/2021	12480 UNITED SITE SERVICES	114-12408216 114-12417923	53419 53419	PORTABLE TOILETS, TEMP FENCE PORTABLE TOILETS, TEMP FENCE	159.79 201.69
						Total : 361.48
128714	10/14/2021	11194 USAFACT INC	1100933		BACKGROUND CHECK	65.96
						Total : 65.96
128715	10/14/2021	10338 VANDIVER, EDDIE	09162021EV		COMMISSION STIPEND	50.00

Bank code : ubgen

Voucher	Date	Vendor	Invoice	PO #	Description/Account	Amount
128715	10/14/2021	10338 10338 VANDIVER, EDDIE	(Continued)			Total : 50.00
128716	10/14/2021	10834 VOEPEL, RANDY	EN21143S		REFUND OF REFUNDABLE DEPOS	1,500.00
						Total : 1,500.00
128717	10/14/2021	10136 WEST COAST ARBORISTS INC	176808	53503	URBAN FORESTRY MANAGEMENT	996.80
			176809	53503	URBAN FORESTRY MANAGEMENT	640.80
						Total : 1,637.60
128718	10/14/2021	10537 WETMORE'S	06P19818	53475	VEHICLE REPAIR	7.47
						Total : 7.47
57 Vouchers for bank code : ubgen						Bank total : 1,268,515.27
57 Vouchers in this report						Total vouchers : 1,268,515.27

Prepared by: 126321 Sueda
Date: 10/14/2021
Approved by: Heather Jennings
Date: 10/14/2021

MEETING DATE October 27, 2021

ITEM TITLE APPROVAL OF THE EXPENDITURE OF \$79,520.10 FOR SEPTEMBER 2021 LEGAL SERVICES AND REIMBURSABLE COSTS

DIRECTOR/DEPARTMENT Tim K. McDermott, Finance *TM*

SUMMARY

Legal services invoices proposed for payment for the month of September 2021 total \$79,520.10 as follows:

1) General Retainer Services	\$ 15,761.12
2) Labor & Employment	1,458.00
3) Litigation & Claims	8,263.77
4) Special Projects - General Fund	35,104.50
5) Special Projects – Other Funds	9,057.91
6) Third-Party Reimbursable Projects	<u>9,874.80</u>
Total	<u>\$ 79,520.10</u>

FINANCIAL STATEMENT *TM*

	<u>AMOUNT</u>	<u>BALANCE</u>
General Fund:		
Adopted Budget	\$ 796,920.00	
Revised Budget	\$ 796,920.00	
Prior Expenditures	(124,361.21)	
Current Request	(60,587.39)	\$ 611,971.40
Other Funds (excluding third-party reimbursable items):		
Adopted Budget	\$ 85,000.00	
Revised Budget	\$ 85,000.00	
Prior Expenditures	(10,784.20)	
Current Request	(9,057.91)	\$ 65,157.89

CITY ATTORNEY REVIEW N/A Completed

RECOMMENDATION *MSB*

Approve the expenditure of \$79,520.10 for September 2021 legal services and reimbursable costs.

ATTACHMENTS

1. Legal Services Billing Summary September 2021
2. Legal Services Billing Recap FY 2021-22



**LEGAL SERVICES BILLING SUMMARY
SEPTEMBER 2021**

DESCRIPTION	CURRENT AMOUNT	INVOICE NUMBER	NOTES
Retainer 1001.00.1201.51020	\$ 15,761.12 <u>15,761.12</u>	916492	
Labor & Employment: Labor & Employment 1001.00.1201.51020	 1,458.00 <u>1,458.00</u>	 906514	
Litigation & Claims: Litigation & Claims	2,357.10	906515	
Affordable Housing Coalition of San Diego County	147.80	916519	
Parcel 4 Litigation	5,655.80	916498	
Brooks Receivership 1001.00.1201.51020	103.07 <u>8,263.77</u>	917774	
Special Projects (General Fund): Community Oriented Policing	3,358.10	916516	
Municipal Code Update	3,717.90	916518	
CEQA Special Advice	2,222.40	916507	
Water Quality	2,745.90	916520	
Election Services	631.80	916495	
Housing Element	170.10	916496	
Measure N Implementation	121.50	916503	
Advanced Records Center Services for PRA	1,967.80	916504	
Cannabis 1001.00.1201.51020	18,273.60 <u>33,209.10</u>	916502	
Special Projects - CSA 69 (General Fund) CSA 69 Dissolution 1001.03.2203.51020	 <u>1,895.40</u>	 916505	
Special Projects (Other Funds): Rent Control Commission	5,127.30	916517	2901.04.4106.51020
Cuyamaca Street Right-of-Way Acquisition	3,128.71	916501	cip71402.30.05
Highway 52 Coalition 1001.03.2203.51020	801.90 <u>9,057.91</u>	916508	2104.00.1901.51020
Third-Party Reimbursable: Castlerock (Weston)	374.40	916506	spp0801a.10.05
Redevelopment of Carlton Oaks Golf Course	2,676.70	916509	cup1906a.10.05
Tyler St. Subdivision	301.60	916510	tm17001a.10.05
Laurel Heights	1,998.10	916512	tm20002a.10.05
Slope Street Subdivision 1001.03.2203.51020	4,524.00 <u>9,874.80</u>	916513	tm20001a.20.05
Total	 <u><u>\$ 79,520.10</u></u>		

**LEGAL SERVICES BILLING RECAP
FY 2021-22**

Attachment 2

<u>Category</u>	<u>Adopted Budget</u>	<u>Revised Budget</u>	<u>Previously Spent Year to Date</u>	<u>Available Balance</u>	<u>Current Request Mo/Yr</u>	<u>Amount</u>
General Fund:						
General / Retainer	\$ 190,920.00	\$ 190,920.00	\$ 31,486.00	\$ 159,434.00	Sep-21	\$ 15,761.12
Labor & Employment	60,000.00	60,000.00	4,349.70	55,650.30	Sep-21	1,458.00
Litigation & Claims	275,000.00	275,000.00	22,597.37	252,402.63	Sep-21	8,263.77
Special Projects	271,000.00	271,000.00	65,928.14	205,071.86	Sep-21	35,104.50
Total	\$ 796,920.00	\$ 796,920.00	\$ 124,361.21	\$ 672,558.79		\$ 60,587.39
Other City Funds:						
MHFP Commission	\$ 5,000.00	\$ 5,000.00	\$ 2,138.40	\$ 2,861.60	Sep-21	\$ 5,127.30
Capital Projects	75,000.00	75,000.00	8,645.80	66,354.20	Sep-21	3,128.71
Highway 52 Coalition	5,000.00	5,000.00	-	5,000.00	Sep-21	801.90
Total	\$ 85,000.00	\$ 85,000.00	\$ 10,784.20	\$ 74,215.80		\$ 9,057.91
Third-Party Reimbursable:						
Total			\$ 28,644.28		Sep-21	\$ 9,874.80

Total Previously Spent to Date FY 2021-22	
General Fund	\$ 124,361.21
Other City Funds	10,784.20
Applicant Deposits or Grants	28,644.28
Total	\$ 163,789.69

Total Proposed for Payment	
General Fund	\$ 60,587.39
Other City Funds	9,057.91
Applicant Deposits or Grants	9,874.80
Total	\$ 79,520.10

MEETING DATE October 27, 2021

ITEM TITLE DRAFT URBAN FORESTRY MANAGEMENT PLAN

DIRECTOR/DEPARTMENT Bill Maertz, Community Services *WM*

SUMMARY

On January 8, 2020, the City adopted the Sustainable Santee Plan and certified the related Final Environmental Impact Report. Certain environmental groups initiated a lawsuit to challenge those actions by the City. In June 2020, the City and the environmental groups reached a settlement, pursuant to which the City agreed to consider an Urban Forestry Management Plan (UFMP). On February 10, 2021, the City Council approved an amendment to its contract with West Coast Arborists to provide for preparation of a UFMP. The adoption of a UFMP will facilitate additional tree planting to aid with climate resilience, efficient tree trimming or removal and specify tree species most appropriate for planting in public and private projects. On August 11, 2021 the City Council received a status report on preparation of the Urban Forestry Management Plan.

During the October 27, 2021 presentation, staff and the consultant will provide an update on preparation of the draft Urban Forestry Management Plan and receive City Council direction.

ENVIRONMENTAL REVIEW

This action is categorically exempt from the California Environmental Quality Act ("CEQA") pursuant to section 15301 (maintenance of existing structures, facilities or mechanical equipment).

FINANCIAL STATEMENT *m*

None with this item.

CITY ATTORNEY REVIEW N/A Completed

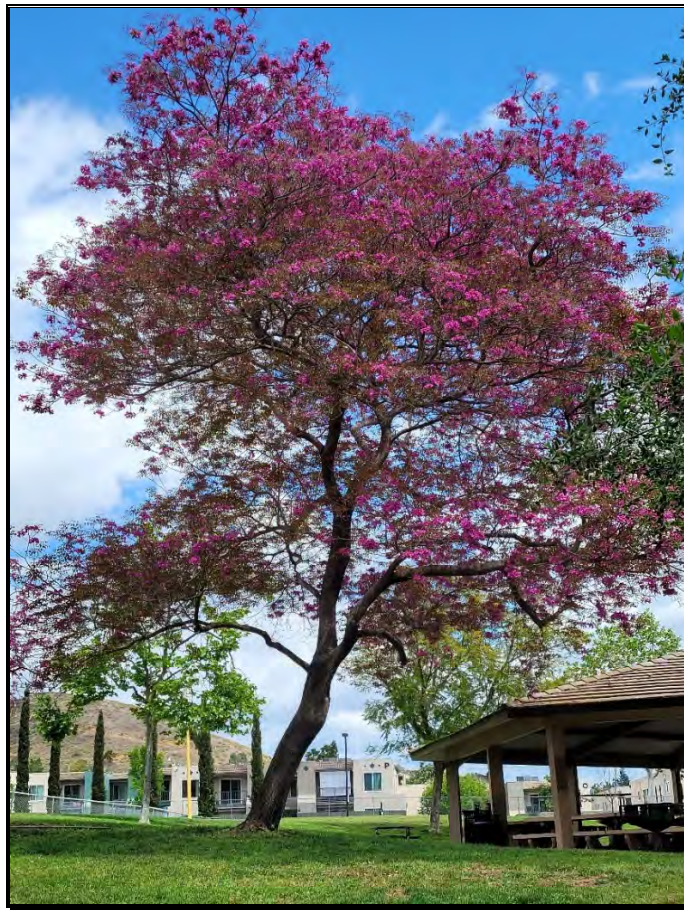
RECOMMENDATION *MdB*

Provide direction to staff.

ATTACHMENTS

Preliminary Draft Urban Forestry Management Plan

City of Santee
Urban Forest Management Plan
December 2021





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Table of Contents

Section 1 – Executive Summary	1
History and Background	
Urban Forest Management Plan Contents	
Section 2 – Inventory Report	2
Canopy Assessment	
Priority Trees	
Section 3 – Urban Forest Operations	3
Maintenance Program	
Maintenance Schedule	
Standards and Best Management Practices	
Plant Health Care and Risk Assessment	
Green Waste and Urban Wood Recycling	
Emergency Operations	
Wildlife Protection	
Section 4 –Climate Resiliency	4
Tree Palette	
Planting Plan	
Reduction of Urban Forest Heat Island Effects	
Planning, Development, and Infrastructure	
Sustainability	
Section 5 – Public Participation	5
Education-Tree City USA	
Tree Ordinance	
Caring for Private Trees	
Resources and Guide for Homeowners and Businesses	



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Section 1

Executive Summary

History and Background

Located east of Mission Valley in the County of San Diego, the City of Santee (City) is a thriving community that values low crime and high quality of life. The youthful urban forest promises multiple environmental benefits to the growing community. This community appreciates the old-fashioned values such as hard work and determination as well as the recreational lifestyles that bring families together. One of many things that brings families together are the trees which cool the environment and provide shelter from the warm summers, just as they did for the local Native American tribes and early settlers in the region. The community treasures its beautiful trees and fosters a healthy environment.

An integral part of this friendly community are the maturing trees in the community forest. The benefits of trees are well known. Generations of children have learned in school that trees are vitally important to the well-being of the community. As they see the community grow and mature, they care for the trees around them which helped their community flourish.

To support the community in being good stewards of the environment and in the care of its urban forest, this Urban Forest Management Plan (UFMP) provides key information related to the maintenance of trees. It is critical to know and share the benefits of trees, especially the fact that when trees can grow their canopy to their largest feasible size, they provide maximum benefits for the community. Residents may be interested to know that trees:

- Beautify the landscape
- Reduce water consumption in the landscape
- Provide shade and cooling for homes and leisure
- Provide habitat for wildlife
- Improve air quality
- Serve as a windbreak
- Provide direct and indirect positive economic property value
- Capture storm water
- Reduce runoff

The City of Santee finds that management of the publicly maintained trees is essential and has codified this by including it in the City's Urban Forestry Ordinance Chapter 8.06. The Master Plan requires the preservation of the visual quality of healthy trees. The City maintains the public trees along arterial, collector, and residential streets, within parks, adjacent to trails, and around City-managed facilities.



Urban Forest Master Plan Contents

This UFMP begins with Section 2, a report which includes a discussion on the major trends in the City’s tree inventory such as the condition of the trees and their current recommended maintenance. A species composition report, as well as charts and graphs, give quick and easy to read reference information from the time of data collection.

Section 3 makes up the bulk of the management plan by outlining the maintenance program and schedules, the standards and best management practices for maintaining trees, and strategies for plant health care, tree risk management, green waste and urban wood recycling, emergency operations, and wildlife protection. This section provides the best place for City staff to obtain information on tree care and management.

Section 4 provides staff with critical information on the City’s tree palette and planting plan, then builds upon this information to a planning level with key climate resiliency, sustainability and development considerations. This will help to ensure the City meets its canopy cover goal to reduce urban heat island effects as the climate warms and dries in the coming decades.

Section 5 supplies the City with numerous resources for the public to understand and participate in urban forest management. By having an actively engaged and enthusiastic public that is concerned and appreciates tree care, the community will ensure that its trees will provide the expected benefits to generations of residents for many years to come.





Section 2

Inventory Report

Canopy Assessment

The existing inventory of the community's trees has a strong preference towards species native to North America, Europe, and Asia. A snapshot of the top ten tree species in the city reveals a trend toward deciduous trees (six of the top ten species). The inventory consists of ninety genera of trees. Evergreen trees make up 52% of the publicly maintained forest while fully to partly deciduous trees make up the remaining 48% of the population.

As of October 20, 2021, there are a total of thirty-five families of trees. The family with the most species, (and by extension the greatest diversity), is the Myrtaceae consisting of twenty-seven species from seven genera (Callistemon, Corymbia, Eucalyptus, Leptospermum, Lophostemon, Melaleuca, and Syzygium). The Fabaceae family is also well-represented by twenty-two species, especially from the genera Acacia, Cercis, and Robinia.

Insert frequency reports, graphs, text.

Priority Trees

An integral component of the UFMP is a priority plan which identifies trees that need service before routine pruning takes place. The priority decision may be due to safety concerns and the availability of funds to replace removed trees where growing space allows more maximum canopy coverage.

The current inventory has identified one hundred fifty-three potential high-risk trees in several categories of reasons for inspection or removal. In addition, the inventory contains trees with recommended maintenance of Trim-Poorly Structured and Patrol for Disease and Decline. This second tier of priority trees can be retained but need tree care maintenance beyond what can be achieved during a routine trim cycle. This UFMP section provides detailed information on the categories of priority service trees.

Insert AA inventory overview recommendations pie chart and table.

Add text here.



Public safety is of paramount importance when planning tree service work. By utilizing the inventory to identify priority trees for work, the community can specify and assign work in an efficient and timely manner. Lists of trees for service should be created per period or budgeted amount and authorized promptly once the community is notified of trees requiring this level of attention.

One management approach to prioritization of work is to assign staff to validate removal recommendations by viewing trees and approving trees for removal, then authorizing the work to be completed with a due date. A second approach might be to assign tree prioritization through risk assessment of related targets, the likelihood of failure, and the consequences of failure. This risk assessment approach provides written documentation of findings which can be helpful for trees in difficult situations. Regardless of the approach taken to prioritization for work, follow through on a timely basis is key to managing trees to reduce failures and the resultant claims.

Once a tree removal has taken place the tree site should be updated in the inventory to a vacant site for future planting. If a site is no longer suitable for a tree it may be noted as such in the inventory. Tree replacement shall follow the community's approved plant list for street trees. Planting should be scheduled preferably from October through April to allow for the best establishment prior to summer heat. The mature size of the tree to be planted should be taken into consideration when choosing installation sites, as established trees or utilities may shade or interfere with proper canopy or root growth.

Poorly Structured Trees

Once the priority removal trees have been managed per the community's standards, the next category of trees for inspection and service assignment are those with a recommended maintenance of Trim-Poorly Structured. These trees require specific pruning work or tree maintenance practices beyond the scope of typical routine/grid pruning.

It is recommended that a certified arborist inspect the trees to specify certain pruning cuts and amounts of foliage to trim to improve their structure per ANSI standards. Examples of trees requiring further inspection by a certified arborist include those with recent failures, unbalanced canopies, new or severe leans, or large cracks in limbs that require cabling or bracing.

Patrolling Trees

A third category of trees recommended for visual inspection and service beyond the scope of routine pruning are those with a recommended maintenance of Patrol for Disease or Decline. These trees are in decline due to environmental problems, disease pathogens, or due to normal senescence. They have not reached the point where removal is necessary. They may be improved by plant health care practices and can remain on a routine pruning program with regular observation by a certified arborist. Sample foliage or soil tests may reveal the presence of pathogens, pests, or nutrient deficiencies or excesses that require service by trained plant health care technicians.

The goal of this category of trees is to improve their health when possible and move them to the Grid/Routine Trim category. In some cases, due to site or other environmental conditions, this may not be possible, and the trees will need to remain in this category with regular inspections for their health and condition until such time as continued maintenance is no longer warranted and removal is recommended. An example of trees that would not return to optimum health are those with internal decay or diseased, dying, or damaged roots. Routine assignment of inspections of these trees is important to prevent failure of branches or the whole tree and protect the public.

The inventory has been included in this UFMP in list form by recommended maintenance type as a type of checklist for inspection purposes. Though this is a concise snapshot of the community's forest at the time of data collection, it is recommended to frequently view the current data as work is performed.

Insert the AA inventory of trees in all categories of removal, trim poorly structured, and patrol for disease or decline.



Section 3

Urban Forest Operations

Maintenance Program

Insert text here.

Maintenance Schedule

Add text here.

Standards and Best Management Practices

One goal of the community's tree management is to support a high quality of life, through the performance of services at optimal standards. This section includes the arboriculture industry standards and best management practices to help the community meet their urban forest priorities.

To ensure all tree maintenance is consistent in approach, standards must be in place for all city staff and contractors to follow. In the tree care industry, the national standard is the American National Standard Institute (ANSI), specifically the A300 and associated parts developed by the Tree Care Industry Association (TCIA). These standards included in this section are periodically reviewed and revised to provide the industry with the best information available. The community should keep the current ANSI standards available for reference. Those standards are to be followed when pruning any community-maintained trees.

The International Society of Arboriculture (ISA) is recognized worldwide as a champion of professional tree care. By certifying tree workers and arborists across the world, agencies, contractors, and municipalities are assured that the tree care professionals that maintain and inspect trees are properly trained and adhere to ethical standards. The ISA Best Management Practices (BMPs) provide guidance to care for trees in various topics which correspond to the ANSI A300 parts. The community should utilize these BMPs when performing tree maintenance.

The current Third Edition of the ISA Pruning BMP is included in this section for reference. The community is encouraged to keep the other BMPs on file. Those additional BMPs that are applicable for most work anticipated to be performed include the following:



Tree and Shrub Fertilization Third Edition-2013
Managing Trees During Construction Second Edition-2016
Tree Planting Second Edition-2014
Root Management-2017
Tree Risk Assessment-2011
Integrated Pest Management Second Edition-2016
Tree Care for Birds & Other Wildlife-2017

Add text here.

Plant Health Care & Risk Assessment

Our urban forests face numerous challenges from environmental factors such as extreme heat and drought which place stress on trees and make them more susceptible to pests and disease. In the face of these pressures on tree health it is recommended to patrol the City-maintained trees on a regular basis to identify the presence of potentially damaging pests and disease and act on them according to industry best practices and the latest scientific research and findings. This section outlines the threats to this community's trees and ways to safely manage them to preserve tree health.

As noted in Section 2 in the canopy assessment, the community's forest is predominantly composed of trees native to the northern hemisphere. There are important key pests and disease of concern for the community's trees that are native to California and to other areas of the world. The severity of these pests and disease can change over time with some years being worse than others depending on the weather and the presence of predatory beneficial insects. Knowing what tree species are affected and the severity of the potential or current damage will aid in planning for a pest management program.

Below is a summary of frequently planted trees in the region by taxonomic family (with common names) and the typical pests and diseases that may require pest management activity.

Anacardiaceae (California Pepper, Chinese Pistache, African Sumac): Armillaria root disease, Verticillium wilt disease, psyllid insects, thrips insects, scale insects.

Arecaceae (Canary Island Date Palm): Crown drop disease, Fusarium wilt disease, Pink Rot disease.

Betulaceae (alders, hornbeams): Armillaria root disease, Botryosphaeria canker and dieback disease, Flatheaded and Longhorned borer beetle insects, aphid insects.

Cannabaceae (hackberries): Verticillium wilt disease, Armillaria root disease, scale insects, Hackberry woolly aphid insect.

Casuarinaceae (River She Oak): Armillaria root disease, scale insects.

Cupressaceae (cypress trees, redwood): Canker diseases, Phytophthora root and crown rot, aphid insects, spider mites, Cypress bark beetles, Cypress bark moths, scale insects, mealybug insects.

Fabaceae (locusts, Japanese Pagoda Tree, redbuds): Carpenterworm moths, bark beetle insects, aphid insects, scale insects, spider mites.

Fagaceae (oaks): Armillaria root disease, Phytophthora root and crown rot, Drippy nut disease, Carpenterworm moths, Flatheaded borer insects.

Juglandaceae (walnuts): Phytophthora root and crown rot, Walnut thousand cankers disease, Armillaria root disease, Pacific flatheaded borer insect.

Lauraceae (Avocado, Camphor Tree): Verticillium wilt disease, Phytophthora root and crown rot, Persea mite.

Lythraceae (Crape Myrtle): Powdery mildew disease, Crapemyrtle aphid.

Magnoliaceae (Magnolias) : Bacterial blight and canker disease, scale insects, aphid insects, thrips insects, slime flux disease.

Moraceae (Indian Laurel Fig, White Mulberry): Bacterial blight and canker disease, Armillaria root disease, whitefly insects, mealybug insects, scale insects, slime flux disease.

Nyssaceae (Sour Gum): Redhumped caterpillars, European fruit lecanium insects.

Oleaceae (ash trees, Olive): Verticillium wilt disease, Anthracnose disease, Ash borer moths, Ash whitefly insects, Ash leafcurl aphid insects, Phytophthora root and crown disease, Bacterial Leaf Scorch, Olive psyllid insect, scale insects, root rot nematodes.

Pinaceae (Deodar Cedar, pines): Armillaria root disease, Phytophthora root and crown disease, pine bark adelgid insects, spider mites, pine bud mites, bark beetles.

Platanaceae (plane trees, Sycamore): Phytophthora root and crown disease, Sycamore canker stain disease, Powdery mildew disease, sycamore scale insects, Anthracnose disease, Pacific Flatheaded borer insects, Sycamore borer insects.



Rosaceae (Crabapple, English Hawthorn, Bronze Loquat, pears, plums): Armillaria root disease, Fire Blight disease, Bacterial blight and canker disease, spider mites.

Saliaceae (Fremont Cottonwood, Lombardy Poplar, Weeping Willow): Powdery mildew disease, Armillaria root disease, Bacterial Blight and canker disease, rusts diseases, Lace bug insects, caterpillar insects, aphid insects, scale insects, Carpenterworm moths, slime flux disease.

Sapindaceae (California Buckeye, Box Elder, Bigleaf Maple): Oak bark beetles, Anthracnose disease, Powdery mildew disease.

Ulmaceae (elms): Dutch elm disease, Verticillium wilt disease, Armillaria root disease, Chinese elm anthracnose, aphid insects, scale insects, Elm leaf beetle, Elm bark beetles, Carpenterworm moths, Foamy canker disease, slime flux disease.

Integrated pest management (IPM) is a concept that has been a practice in agricultural crop management for any years but only recently been formally recommended as a standard practice within the landscape and tree care industry. In general, pest management activities strive to avoid or control damaging infestations. The methods used to provide control may involve eradication, suppression, or prevention depending on the situation as determined by a California licensed pest control advisor (PCA).

Monitoring pests and the damage they cause can provide valuable insight into the proper pest management methods to use, which may include biological, chemical, cultural, mechanical, or physical options. In this system, a licensed pest control company and professional holding a qualified applicator license (QAL) may choose the option(s) most likely to provide control. By using this ecosystem-based system of multiple treatment options and application methods, long-term control may be achieved while doing as little environment harm as possible. The pest control tools selected will reduce harm to beneficial organisms and human health.

The ANSI 2016 standard practices for IPM provide the written specification guidelines needed to ensure uniform implementation of programs and the strategy for a population of trees. The important objectives to consider are:

- Key plants(s) and key pests(s)
- Monitoring protocols
- Action threshold decision-making guidelines
- Treatment options
- Environmental and site limitations
- Cultural needs and conditions
- Soil conditions



Once the objectives have been determined and established, several important factors should be considered in making pest management decisions. Having a dedicated plant health care budget for IPM ensures that the urban forest will be well-managed and protected to prevent large scale damage from pest threats. Plants that are not performing well or that require a high level of pest management should be considered for replacement. Preference should be given to species and varieties more resistant to pests so that funding is not exhausted on trees that cannot be reasonably expected to be protected or kept in good or fair condition.

It is also important to plant species of plants that promote predatory beneficial insects. The conservation, introduction, and / or augmentation of beneficial natural insects should be considered. Preference should be given to the use of chemicals with minimal threat of adverse impact to non-target organisms. The ISA Integrated Pest Management Best Management Practices provides helpful information for management decisions such as cultural practices and control tactics that can help create favorable conditions for tree health and benefit the environment in general.

An effective IPM program is one that is continually evaluated and adjusted in relation to the objectives. An annual report stating the past treatment results and planned future treatments is advised to ensure that staff and the public understand the program. The critical part of the report are the monitoring results which consider:

- Date of inspection
- Key plants & key pests
- Locations
- Observations
- Treatments on targeted pests
- Materials used
- Public outreach needed
- General safety observations

Integrated Pest Management (IPM) and sustainability are important concepts to incorporate into community forest management, for each needs the other to operate effectively. Safe and effective pest control that is environmentally conscious is key to protecting beneficial insects and wildlife in the natural environment.

Add more text here specific to Santee, plus risk assessment information.



Green Waste and Urban Wood Recycling

Add text here.

Recycling of green waste and tree byproducts is pivotal to sustainability efforts statewide, and the community can participate in several ways. Trees can be recycled yet kept in the community in various forms for additional job opportunities for local artisans. They can also be further used in landscape and hardscape products such as edging and forming or made into keepsakes as donations. Urban wood is a valuable part of the sustainability movement and locally removed trees can be re-purposed into attractive furniture and useful items to sequester carbon and improve the environment. Involving the community in sustainability, encouraging recycling efforts, and seeking advice from experts will ensure the best use of community resources and improve the quality of life for residents and the natural environment.

Emergency Operations

Trees provide many benefits to the City, but they can fail in extreme weather events and thus affect emergency operations. Fallen limbs or whole trees can impede travel by first responders to people in need. It is critical for public safety personnel to be able to respond with little or no delay from outside influences such as trees blocking access for vehicles. The City acknowledges the critical nature of emergency operations and supports tree care to reduce the number of tree related incidents, which protects the safety of the public.

The goal of the City's tree emergency protocol is to provide rapid response. Whether a request for service comes in from a call to dispatch center or from other city staff, prompt service is paramount. Staff understands that the debris associated with the emergency may be taken to a holding facility such as a park or a maintenance yard to await further processing and recycling. In the case of potential litigation situations, the debris shall be taken to a secure location under the direction of the Director.

If a situation qualifies as a severe national disaster, the city will contact federal authorities for funding via the Federal Emergency Management Act, (FEMA).

Wildlife Protection

This subsection provides guidance to the City based on current laws and regulation pertaining the protection of wildlife. Care of trees in the urban forest inevitably impacts wildlife that use the trees for nesting, feeding, and shelter. The goal of the City is to minimize those impacts during tree work and preserve wildlife habitat.

The purpose of having a subsection dedicated to wildlife protection is so that tree care workers and managers can act responsibly around wildlife. Tree care activities and workers vary in their knowledge of Federal and California wildlife regulations. The value of tree to wildlife found in

the urban forest is high, especially in the City of Santee where sensitive habitat and green areas such as the San Diego River provide extensive habitat for a variety of animals. Urban landscapes are vital to providing habitat for native and non-native species alike and can be effectively managed and designed to benefit the residents and wildlife when professionals and staff are informed.





Insert standards and best management practices.

American National Standard

ANSI A300 (Part 1)-2017 Pruning
Revision of ANSI A300 (Part 1)-2008 (R2014)

*Tree, Shrub, and Other Woody Plant
Management —
Standard Practices (Pruning)*





American National Standard

Tree, Shrub, and Other Woody Plant Management — Standard Practices (*Pruning*)

Secretariat
Tree Care Industry Association, Inc.

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Consensus is established when, in the judgement of the ANSI Board of Standards Review, substantial agreement has been reached by directly and materially affected interests. Substantial agreement means much more than a simple majority, but not necessarily unanimity. Consensus requires that all views and objections be considered, and that a concerted effort be made toward their resolution.

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Contents

Foreword	6
1	ANSI A300 standards – Scope, purpose, and application	8
2	Part 1 – Pruning Standards	8
3	Normative references	8
4	Pruning objectives	9
5	Pruning systems	10
6	Pruning specifications	11
7	Pruning cuts.....	11
8	Pruning practices	13
9	Palms and similar plants	15
10	Definitions	16

Figures are not part of the ANSI A300 (Part 1)-2017 standard.

4.4	Pruning process flowchart	9
7.1.2*	A pre-cut branch	11
7.1.3*	Removing a branch with narrow angle of attachment	12
7.1.5*	Removing a dead branch	12
7.1.9*	A flush cut, not an acceptable practice	12
7.2.1*	A branch removal cut	12
7.2.1.1*	A branch removal cut when a branch collar is not apparent	13
7.3.4*	A reduction cut	13
9.6	An overpruned palm	15
9.10.1	Bamboo pruning cut location.....	15
10.4*	Standard branch definitions	16
10.4.1*	Codominate branch and stem	16

Annex A – Pruning cut guideline.....	21
Annex B – Specification writing guideline	22
Annex C – Applicable ANSI A300 interpretations.....	26
Annex D – Additional explanation of objectives, evolving concepts, explanation of material removed from previous versions	27
Annex E – Urban forest products chart	33

*Original drawings courtesy of Dr. Edward F. Gilman

Foreword This foreword is not considered part of American National Standard *A300 (Part 1)-2017*.

ANSI A300 standards are intended to guide work practices for the care of trees, palms, shrubs, and other woody landscape plants. They apply to arborists, horticulturists, landscape architects, and other professionals who provide for or supervise the management of these plants for property owners, property managers, businesses, government agencies, utilities, and others who use these services. The standard does not apply to agriculture, horticultural production, or silviculture, except where explicitly noted otherwise.

These standards should be used to develop specifications for work assignments; however, they are not intended to be used as work specifications in and of themselves. Effective specifications must include measurable criteria, and must account for the variable characteristics of landscape plants and the individual management objectives of their owners.

The Tree Care Industry Association (TCIA) oversees the Accredited Standards Committee (ASC) on Tree, Shrub, and Other Woody Plant Management Operations – Standard Practices, A300 (ASC A300), which writes the ANSI A300 Standards. TCIA is an ANSI-accredited Standards Developing Organization (SDO), and is secretariat of the ANSI A300 standards. ANSI requires that approved standards be developed according to accepted principles, and that they be reviewed and, if necessary, revised every five years.

Prior to 1991, various industry associations and practitioners developed their own standards and recommendations for tree care practices. Recognizing the need for a standardized, scientific approach, green industry associations, government agencies and tree care companies agreed to develop consensus for an official American National Standard.

Since 1991, ASC A300 has met regularly to write new, and review and revise existing ANSI A300 standards. The committee includes industry representatives with broad knowledge and technical expertise from residential and commercial tree care, utility, municipal and federal sectors, landscape and nursery industries, and other interested organizations.

ANSI A300 Standards are divided into multiple parts, each focusing on a specific aspect of woody plant management (e.g. Pruning, Soil Management, Supplemental Support Systems, etc.). The ANSI A300 standards unify and take authoritative precedence over all previously existing tree care industry standards.

ANSI A300 (Part 1)-2017 Pruning was approved as an American National Standard by ANSI on January 10, 2017.

Suggestions for improvement of this standard should be forwarded to: A300 secretary, c/o Tree Care Industry Association, Inc., 136 Harvey Road – Suite 101, Londonderry, NH 03053.

ASC A300 approval of the standard does not imply that all committee members voted for its approval.

The ASC A300 had the following members as of January 10, 2017:

*Dane Buell, Chair
(BrightView Tree Care Services)*

*Bob Rouse, Secretary
(Tree Care Industry Association, Inc.)*

Organizations Represented

*Alliance for Community Trees
AmericanHort (formerly ANLA)
American Society of Consulting Arborists*

*American Society of Landscape Architects
Asplundh Tree Expert Company
Bartlett Tree Expert Company*

Davey Tree Expert Company

International Society of Arboriculture

Professional Grounds Management Society

*National Association of Landscape Professionals
(formerly PLANET)
Society of Municipal Arborists*

Tree Care Industry Association

*Tree Care Industry Association –
Associate Members (Vendors)*

USDA Forest Service

Utility Arborist Association

Name of Representative

*Dana Karcher
Craig Regelbrugge
Torrey Young
Rick Gessner (Alt.)*

*Susan Cahill
Geoff Kempter
Wayne Dubin
Dr. Thomas Smiley (Alt.)*

*Chris Klimas
Dr. Richard Rathjens (Alt.)
Dr. Richard Hauer
Wes Kocher (Alt.)*

*Gene Pouly
Michael Bova (Alt.)*

*TBD
Paul Mendelsohn (Alt.)*

*Nolan Rundquist
Gordon Mann (Alt.)*

*Tom Mugridge
Sam Hill (Alt.)*

*Tim Bushnell
Roger Mellick (Alt)*

*Dana Coehlo
Jill Johnson (Alt)*

*William T. Rees
Neil Fischer (Alt.)*

Additional organizations and individuals:

*Tim Johnson (Observer)
Myron Laible (Observer)
Beth Palys (Observer)
Richard Roux (NFPA-780 Liaison)*

A300 Part 1 Subgroup Chair:

Geoff Kempter

Mission: To develop consensus performance standards for the professional management of trees, shrubs and other woody plants.

Vision: ANSI A300 standards will be the foundation for work specifications, training materials, quality protocols, and regulations for the management of trees, shrubs, palms, and other woody landscape plants.

of this American National Standard. All standards are subject to revision, and parties to agreements based on this American National Standard shall apply the most recent edition of the standards indicated below.

ANSI A300 *Tree, Shrub, and Other Woody Plant Management – Standard Practices*, all Parts¹

ANSI Z60 *Nursery stock*²

ANSI Z133 for *Arboricultural Operations – Safety Requirements*³

29 CFR 1910, *Occupational Safety and Health Standards (General Industry)*⁴

16 U.S.C. §§703-711, *Migratory Bird Treaty Act*⁵

16 U.S.C. 1531-1544, *Endangered Species Act*⁵

¹) Available from the Tree Care Industry Association, www.tcia.org

²) Available from AmericanHort, www.americanhort.org

³) Available from the International Society of Arboriculture, www.isa-arbor.com

⁴) Available from U.S. Department of Labor, www.osha.gov

⁵) Available from U.S. Fish and Wildlife Service, www.fws.gov

4 Pruning objectives

4.1 One or more pruning objectives shall be specified (see Annex D – *Additional explanation of objectives, evolving concepts, explanation of material removed from previous versions*).

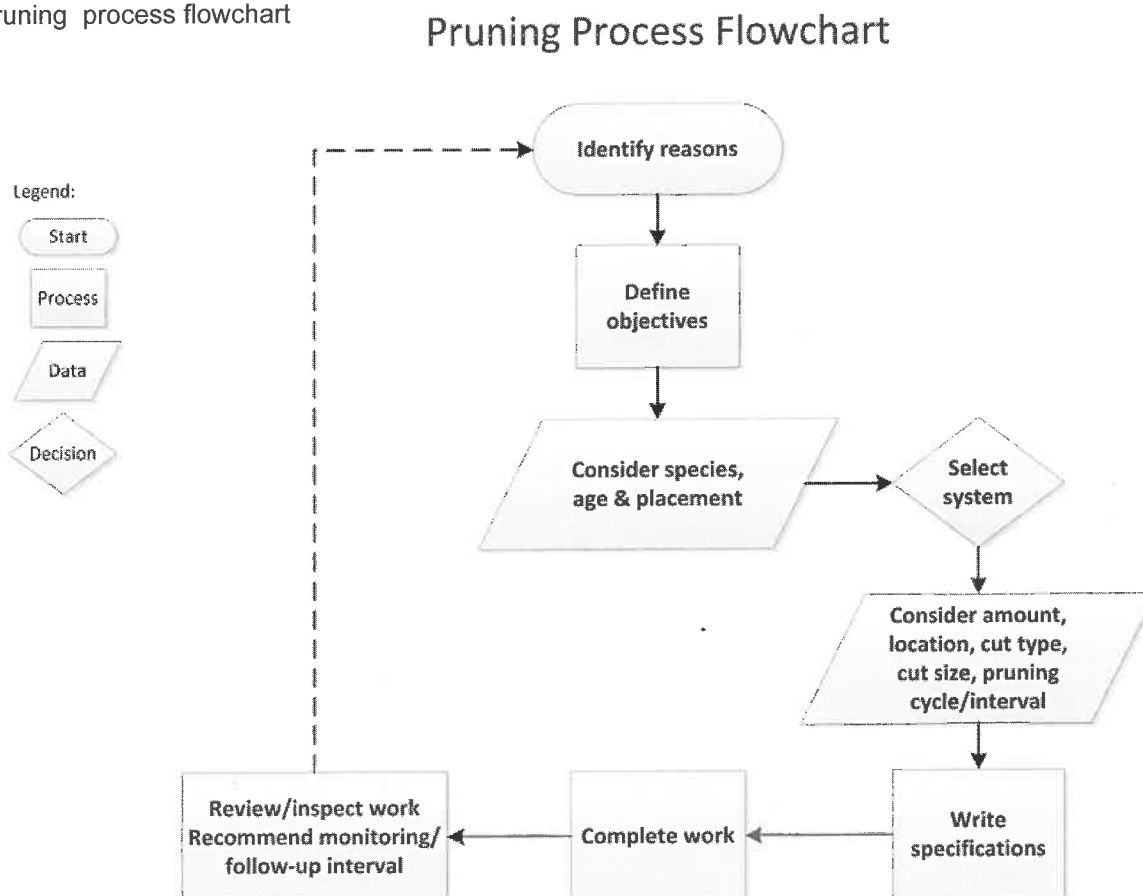
4.1.1 The **pruning system** (if specified, see subclause 5), plant health, growth habit, structure, species characteristics, expected response, and the ability of a plant to sustain the amount of pruning proposed shall be considered when establishing pruning objectives.

4.2 Objectives should include, but are not limited to, one or more of the following:

Manage risk (see ANSI A300 Part 9, *Tree Risk Assessment*, and ANSI A300 Part 3, *Supplemental Support Systems*).

Manage health (see ANSI A300 Part 10, *Integrated Pest Management* and ANSI A300 Part 2, *Soil Management*).

Fig. 4
Pruning process flowchart



American National Standard

Part 1 – Standard Practices (Pruning)

1 ANSI A300 standards

1.1 Scope

ANSI A300 performance standards cover the care and management of trees, shrubs, palms, and other woody landscape plants.

1.2 Purpose

ANSI A300 standards are intended for the development of work practices, written **specifications**, best practices, regulations and other measures of performance.

1.2.1 These standards may be excerpted or incorporated by reference; however, they are not intended to be adopted in their entirety into laws and regulations or as work specifications without additional information and clarification (see *Annex B – Specification writing guideline*).

1.3 Application

ANSI A300 standards shall apply to any person or entity engaged in the management of trees, shrubs, palms, or other woody plants, including federal, state or local agencies, utilities, **arborists**, consultants, arboricultural or landscape firms, and managers or owners of property.

1.3.1 ANSI A300 standards shall not apply to commercial agricultural, horticultural production, or silviculture unless this standard, or a portion thereof, is expressly referenced in other standards or specifications.

2 Part 1 – Pruning standards

2.1 Purpose

The purpose of Part 1, *Pruning*, is to provide performance standards for the pruning of trees, shrubs, palms, and other woody plants, and to guide the

development of written specifications, best practices, training materials, regulations, and other performance measures.

For root pruning standards, refer to the most recent version of ANSI A300 Part 8, *Root Management*.

2.2 Reasons

Reasons for pruning include reducing **risk**, improving or maintaining health, developing desired structure and appearance, preventing interference with the built environment, and other specific objectives.

2.3 Implementation

2.3.1 Specifications for pruning should be written and administered by an arborist or other **qualified professional** (see clause 4).

2.3.2 Following pruning operations, monitoring and follow-up recommendations should be made based on the pruning objective, plant condition, site/location, species, and growth rate.

2.3.3 Pruning shall be performed only by arborists or other qualified professionals who, through related training and on-the-job experience, are familiar with the standards, practices, and hazards of **arboriculture** related to pruning and the equipment used in such operations.

2.3.4 The location and type of utilities and other obstructions shall be considered prior to pruning operations.

2.4 Safety

2.4.1 This performance standard shall not take precedence over applicable industry safe work practices.

2.4.2 Performance, including pruning in proximity to energized conductors, shall comply with applicable Federal Occupational Safety and Health Administration (OSHA) standards, 29 CFR 1910.331 – 335, 29 CFR 1910.269, ANSI Z133, and state and local laws and regulations as they apply.

3 Normative references

The following standards contain provisions, which, through reference in the text, constitute provisions

Develop structure, such as to:

- Improve **branch** and **trunk** architecture;
- Promote or subordinate certain leaders, **stems**, or branches;
- Promote desirable branch spacing;
- Promote or discourage growth in a particular direction (**directional pruning**);
- Minimize future interference with traffic, lines of sight, or infrastructure, or other plants;
- Restore plants following damage; and/or,
- Rejuvenate shrubs (see Annex D – *Additional explanation of objectives, evolving concepts, explanation of material removed from previous versions*).

Provide clearance, such as to:

- Ensure safe and reliable **utility** services;
- Minimize current interference with traffic, lines of sight, infrastructure, or other plants;
- Raise crown(s) for movement of traffic or light penetration;
- Ensure lines-of-sight or desired views;
- Provide access to sites, buildings, or other structures; and/or,
- Comply with regulations.

Manage size or shape.

Improve aesthetics.

Manage production of fruit, flowers, or other products.

Manage wildlife habitat.

5 Pruning systems

5.1 A pruning system should be specified to achieve the desired long-term form of the plant.

5.1.2 Consideration shall be given to the ability of the plant to respond to the selected pruning system.

5.2 Natural (see Annex D – *Additional explanation of objectives, evolving concepts, explanation of material removed from previous versions*).

A natural system should be preferred.

5.2.1 A natural system should allow for changes in appearance resulting from pruning when achieving certain specified objectives, such as:

- Crown or branch **reduction**;
- **Raising** crowns;
- Developing or improving structure;
- Providing clearance;
- Improving tree health;
- Risk reduction; and,
- Enhancing views.

5.3 Pollarding

A pollarding system should be considered when appropriate to achieve management objectives.

5.3.1 Trees selected for pollarding should be of an appropriate size, species, and age.

5.3.1.1 Pollarding should not be initiated on mature trees.

5.3.1.2 A plan shall be made for the periodic removal of **shoots**.

5.3.2 To initiate pollarding, **heading** cuts should be made at specified heights or locations in the crown after which no additional heading cuts should be made.

5.3.3 Existing **pollard heads** should not be damaged or removed. Shoots growing from the pollard heads should be removed at an appropriate time, usually during the dormant season.

5.3.3.1 Shoots should be removed at intervals of three years or less. The recommended shoot removal interval should be determined by species, plant health, climate, and design intent.

5.3.4 Existing pollarded trees should be maintained as pollards.

5.4 Topiary

A topiary system should be used when the objective is a specified form or shape, such as a hedge.

5.4.1 Plants selected for a topiary system should be of an appropriate size, species, and age.

5.4.2 The shape of the topiary should be determined prior to the start of pruning.

5.4.3 Selective pruning and **shearing** should be performed as needed to develop and/or maintain the desired shape.

5.5 Espalier

An espalier system should be used when the objective is to grow plants in a **planary form**.

5.5.1 Plants selected for an espalier system should be of an appropriate size, species, and age.

5.5.2 Branches that extend outside the desired plane of growth shall be pruned and/or tied back.

5.5.3 Ties shall be replaced or adjusted as needed to prevent girdling.

5.6 Pleaching

A pleaching system should be used to train plants to achieve a desired form through pruning, interweaving and tying branches to one another, or to a frame.

5.6.1 Plants selected for a pleaching system should be of an appropriate size, species, and age.

5.6.2 When pleaching is initiated, branches that are not included within the desired form should be reduced, removed, or tied to other branches or a frame.

5.6.3 New shoots that are not growing within the desired form should be periodically pruned, or tied or woven into the desired form.

5.6.4 Ties shall be replaced or adjusted as needed to prevent girdling.

6 Pruning specifications (see Fig. 4 and Annex B – *Specification writing guideline*)

6.1 Pruning specifications should include:

- Physical location of the plants to be pruned;
- Pruning objectives;
- Pruning system;
- Type of parts to be removed (e.g. living or dead branches, fruit, mistletoe);
- **Pruning amount** (e.g. percent of foliage or crown, or number of branches to be removed);
- Location in crown of parts to be removed;
- Pruning cut types (e.g. removal, reduction, heading, shearing);
- Size range (e.g. diameter, length) of parts to be removed;
- Plan for disposal/repurposing of debris;
- Time frame for completion; and,
- Other information as necessary (e.g. topiary shape, clearance distances, desired views, lines of sight).

6.2 Pruning operations should remove no more living material than what is necessary to achieve specified objectives.

6.3 Species, size, age, condition, and site shall be considered when specifying the location and amount of live branches to be removed.

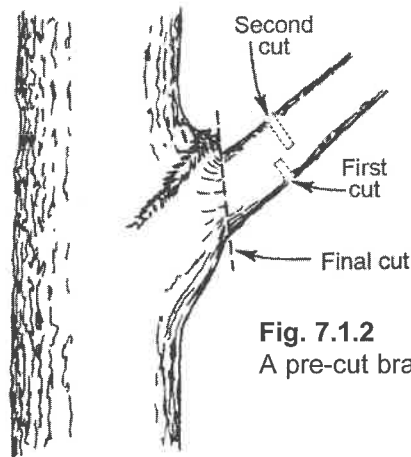


Fig. 7.1.2
A pre-cut branch

7 Pruning cuts

7.1 General

7.1.1 The smallest diameter cut that meets the objective should be preferred.

7.1.1.1 The number and size of cuts that expose heartwood should be minimized.

7.1.2 Branches shall be precut when necessary to avoid splitting of the wood or tearing of the bark (see Fig. 7.1.2 and Annex A – *Pruning cut guideline*).

7.1.3 When removing a branch with a narrow angle of attachment, the cut should be made from the outside of the branch to prevent damage to the remaining branch or stem (see Fig. 7.1.3).

7.1.4 When removing a branch with included bark, the cut should be made as close as possible to the point where the wood of the stems join without damaging the remaining stem (see Fig. 7.1.3).

7.1.5 When removing a dead branch or stem, the final cut shall be made just outside the collar of living tissue, without leaving a dead **stub** (see Fig. 7.1.5).

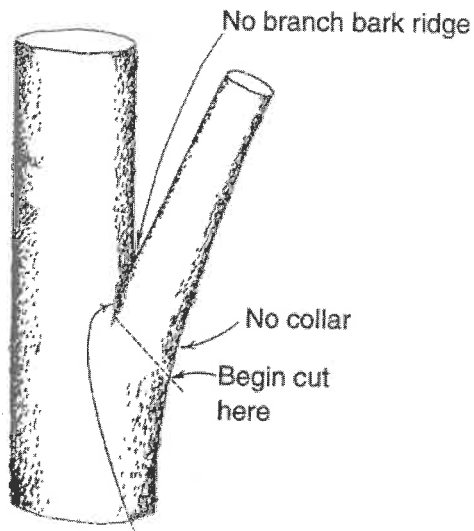


Fig. 7.1.3 Included bark
Removing a branch with narrow angle of attachment.

7.1.6 The final pruning cut should leave adjacent bark firmly attached.

7.1.7 Interior and lower branches should be retained when compatible with objectives and system.

7.1.8 When removing live branches, the majority of cuts should be in the outer portion of the crown.

7.1.9 A **flush-cut** is not an acceptable pruning practice (see Fig. 7.1.9).

7.2 **Branch removal cuts** (see subclause 10.42 and Annex A – *Pruning cut guideline*)

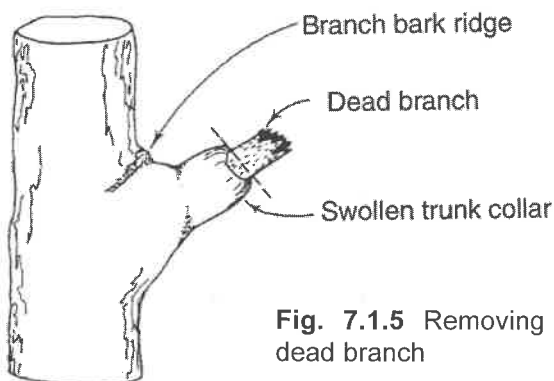


Fig. 7.1.5 Removing a dead branch

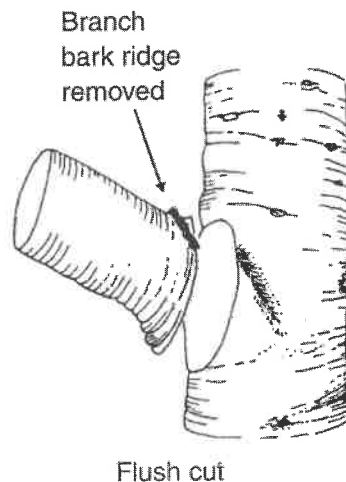


Fig. 7.1.9
A flush-cut, not an acceptable practice

7.2.1 A branch removal cut shall be made without cutting into the **branch bark ridge** or **branch collar**, or leaving a stub (see Fig. 7.2.1).

7.2.1.1 When a branch collar is not apparent, the cut shall be made without cutting into the branch bark ridge, **parent stem**, or leaving a stub (see Fig. 7.2.2.1).

7.3 **Reduction cuts** (see subclause 10.39 and Annex A – *Pruning cut guideline*)

7.3.1 A reduction cut should be made to a live lateral branch or codominant stem when it can be expected to sustain the remaining branch or stem.

7.3.2 The remaining lateral branch should typically be at least one-third the diameter of the stem or branch being removed.

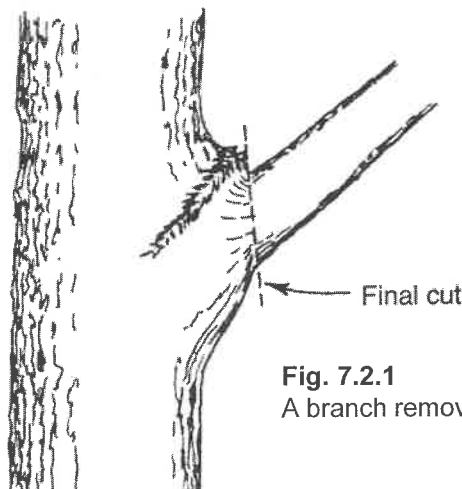
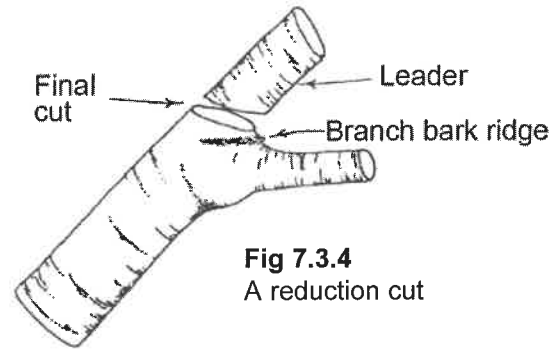
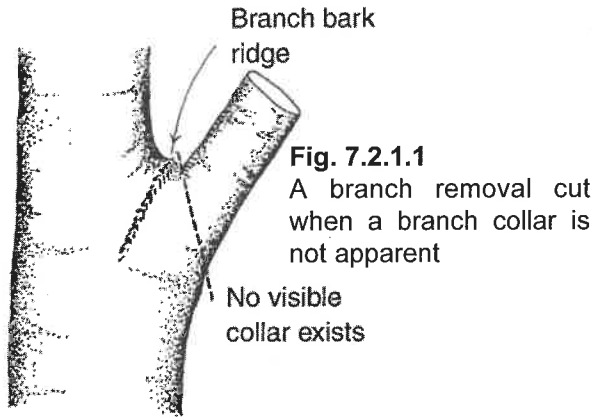


Fig. 7.2.1
A branch removal cut



7.3.3 A reduction cut should be made at a slight angle to the remaining branch or codominant stem, without damaging the branch bark ridge and without leaving a stub (see Fig. 7.3.4).

7.4 Heading cuts

7.4.1 A heading cut should only be made when necessary to conform with certain pruning systems (e.g. Initiation of a pollarding system, topiary pruning), or to accomplish specific pruning objectives, such as:

- **Structural development** on young plants;
- Mitigating risk, where reduction to a suitable lateral branch is not practical, where no such branch is present, or where cutting to such a branch does not achieve the objective;
- **Restoration** of damaged plants;
- **Rejuvenation** of shrubs;
- To avoid making an unnecessarily large branch removal cut where an appropriate lateral branch is not present; and,
- Conserving or creating wildlife habitat.

7.4.2 A heading cut should only be made when it can be expected that the remaining lateral(s) or shoots that grow from retained buds are able to sustain the remaining branch.

7.5 Shearing cuts

7.5.1 Shearing should be performed when necessary to accomplish specified objectives within the topiary system (see subclause 5.4).

7.5.2 Shearing should be performed on appropriate species at intervals that minimize deleterious effects on plant health.

7.5.2.1 Shearing cuts should only be made to stems capable of generating new shoots.

7.5.3 Reduction cuts should be considered after shearing when necessary.

8 Pruning practices

8.1 Inspection

8.1.1 In addition to required safety procedures, an arborist or qualified professional should conduct a visual inspection of the plant(s) to identify conditions that would affect the original scope of work.

8.1.2 Conditions identified in the visual inspection that would affect, or are outside of, the scope of work should be reported to an immediate supervisor or to the **client**.

8.1.2.1 When the scope of work is limited by property boundaries, easements, or other constraints, inspection of plants or parts of plants outside of the assigned scope of work shall not be required.

8.2 Work Practices

8.2.1 Equipment and tools used in pruning operations shall be maintained according to manufacturers recommendations.

8.2.2 Work practices that damage living tissue, other plants or property, beyond the scope of normal work practices, shall be avoided.

8.2.2.1 Where necessary to avoid damage or injury to other parts of the tree, people, or property, rig-

ging or other equipment shall be used to control and lower heavy plant parts to the ground.

8.2.2.2 Climbing spurs shall not be used when entering and climbing trees for the purpose of pruning or other tree maintenance, except in situations where other means are impractical, such as:

- Remote/rural utility rights-of-way;
- When branches are more than throw-line distance apart and there is no other means of climbing the tree;
- When the outer bark is thick enough to prevent damage to the inner bark or cambium; and,
- Emergency operations (see subclause 8.10).

8.2.3 Cut or detached branches shall be removed from the **crow**n upon completion of pruning, at times when the tree would be left unattended, or at the end of the workday, unless otherwise specified in the scope of work.

8.2.4 When pruning has a high potential to spread pests, appropriate precautions should be taken (see Annex A – *Pruning cut guideline* and ANSI A300 Part 10, *Integrated Pest Management*).

8.2.5 When pruning has a high potential to result in sunscald, a temporary protective covering for vulnerable areas of bark should be considered.

8.3 Wound treatment

8.3.1 Wound treatments should be used only when necessary to prevent the spread of pests or for other specified reasons.

8.3.2 Wound treatments that damage the plant shall not be used.

8.3.3 When treating damaged bark, only loose or damaged tissue shall be removed.

8.4 Clearance pruning

8.4.1 Branches growing toward specified **clearance areas** should be reduced to lateral branches or removed to parent stems growing outside and/or away from the clearance area (see subclause 10.15 directional pruning).

8.4.2 When a minimum clearance distance is required, a branch removal or reduction cut should be made beyond the specified clearance distance at

a suitable branch **union**.

8.4.2.1 When a reduction cut cannot be made to a suitable lateral branch, and to avoid an unnecessarily large pruning cut at the parent stem, a heading cut should be considered.

8.4.3 When frequent or excessive pruning is required to achieve objectives due to species, growth habit and/or location, alternatives such as relocation, treatment with growth regulators, or removal and replacement with an appropriate plant, should be considered.

8.5 Mechanical pruning

8.5.1 Mechanical pruning cuts should be made close to the main stem, outside of the branch bark ridge and branch collar. Precautions should be taken to avoid stem wounding.

8.5.2 Mechanical pruning shall only be performed in **remote/rural locations**, away from settled areas and dwellings, or during emergency situations.

8.6 Topping

Reduction of tree size by cutting to stubs without regard for long-term tree health or structural integrity, shall be considered an unacceptable practice.

8.7 Lion tailing

When pruning trees using the natural system, the removal of interior lateral branches that results in a concentration of growth at branch ends shall be considered an unacceptable practice.

8.8 Disposal and/or repurposing

8.8.1 A method for disposal of pruning debris should be specified (see Annex E – *Urban forest products chart*).

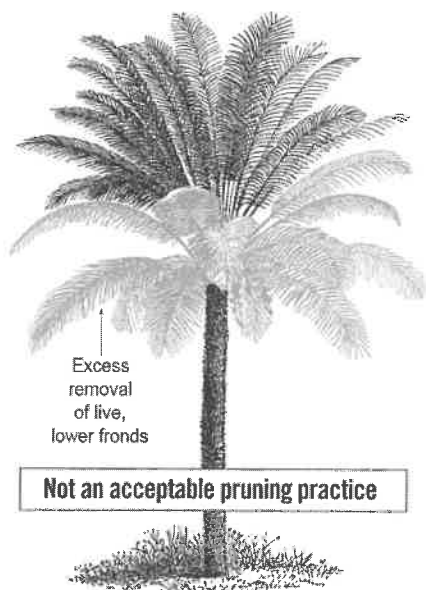
8.8.2 Disposal of pruning debris shall comply with applicable regulations, including quarantines.

8.8.3 Repurposing of debris should be preferred (eg. creating mulch, firewood, wood products, etc.).

8.9 Monitoring and pruning interval

8.9.1 A monitoring and/or a pruning interval should be recommended, and should be based on

Fig. 9.6
An overpruned palm



the objectives, pruning system, plant health, site/location, species, and growth rate (see ANSI A300 Part 7 *Integrated Vegetation Management* and ANSI A300 Part 10 *Integrated Pest Management*).

8.10 Emergency operations

Exemptions to the non-safety related sections of this standard shall be allowed during emergencies, including those declared by federal, state or local governments, utilities or other critical-service providers, when services must be restored.

8.10.1 Following the emergency, restoration pruning should be considered.

9 Pruning palms and similar plants

9.1 Dead, damaged, or loose fronds should be pruned when necessary to reduce risk or improve aesthetics.

9.2 Healthy fronds should not be removed other than to provide clearance.

9.3 Fruits that pose unacceptable risk or nuisance, or flowers that will lead to the development of such fruits, should be removed.

9.4 Palms that could grow into and damage or interfere with electric utility or other infrastructure

should be pruned, treated with growth regulators, relocated, or removed (see subclause 8.4.3).

9.5 Yellowing fronds that are not diseased or infested should be retained, except when they pose safety or aesthetic concerns.

9.5.1 Diseased or infested palms should be treated, or fronds removed, when necessary to reduce the spread of pests and/or to protect the health of the palm (see ANSI A300 Part 10, *Integrated Pest Management*).

9.6 If all or most fronds are damaged (e.g. following high winds or frost), damaged green fronds that do not pose unacceptable risk should be retained until new fronds develop (see Fig. 9.6). This is not an acceptable pruning practice.

9.7 Fronds should be removed by making a cut close to the **petiole** base without damaging living trunk tissue.

9.7.1 To ensure worker safety, removal of **palm frond skirts** shall be performed from the top down (see ANSI Z133, *Arboricultural Safety*).

9.7.2 When removing dead petiole bases (skinning, peeling, shaving), living trunk tissue should not be damaged.

9.8 When palm pruning practices have a high potential to spread pests, appropriate precautions shall be taken.

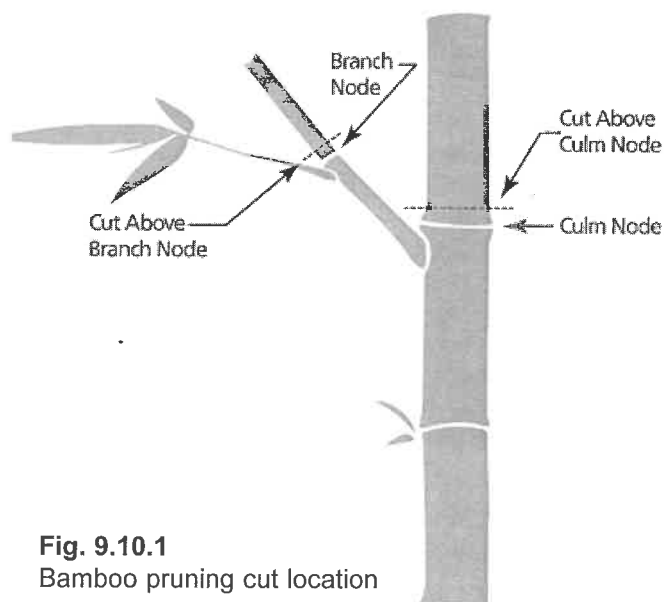


Fig. 9.10.1
Bamboo pruning cut location

9.8.1 Climbing spurs should not be used to climb live palms.

9.9 Disposal of debris should be specified per subclause 8.8 Disposal and/or repurposing.

9.10 Bamboo

9.10.1 Culms and branches shall be pruned by making cuts just above **nodes**, without leaving a stub (see Fig. 9.10.1).

10 Definitions This clause is part of the ANSI A300 (Part 1)-2017 standard.

10.1 arboriculture: The art, science, technology, and business of commercial, public, and utility tree care.

10.2 arborist: An individual engaged in the profession of arboriculture who, through experience, education, and related training, possesses the competence to provide for or supervise the management of trees and other woody plants.

10.3 arborist trainee: An individual undergoing on-the-job training to obtain the experience and the competence required to provide for or supervise

the management of trees and other woody plants. Such trainees shall be under the direct supervision of an arborist.

10.4 branch: A shoot or stem arising from another branch or stem (see Fig. 10.4).

10.4.1 codominant stem/codominant branch: Two or more stems or branches of similar diameter originating from the same union (see Fig. 10.4.1).

10.4.2 lateral branch: A shoot or stem growing from a larger (parent) branch (see Fig. 10.4).

10.4.3 parent stem/branch: A tree trunk, main stem, **leader** or branch from which other smaller branches grow (see Fig. 10.4).

10.5 branch bark ridge: The raised strip of bark on the top and side of a union where the branch and parent stem meet. (see Fig. 7.2.1).

10.6 branch collar: The area of swelling at the union between a parent stem and a smaller branch.

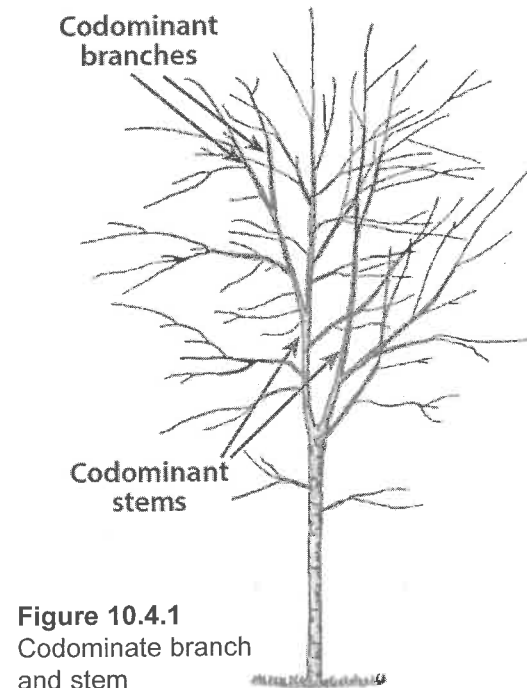


Figure 10.4.1
Codominate branch and stem

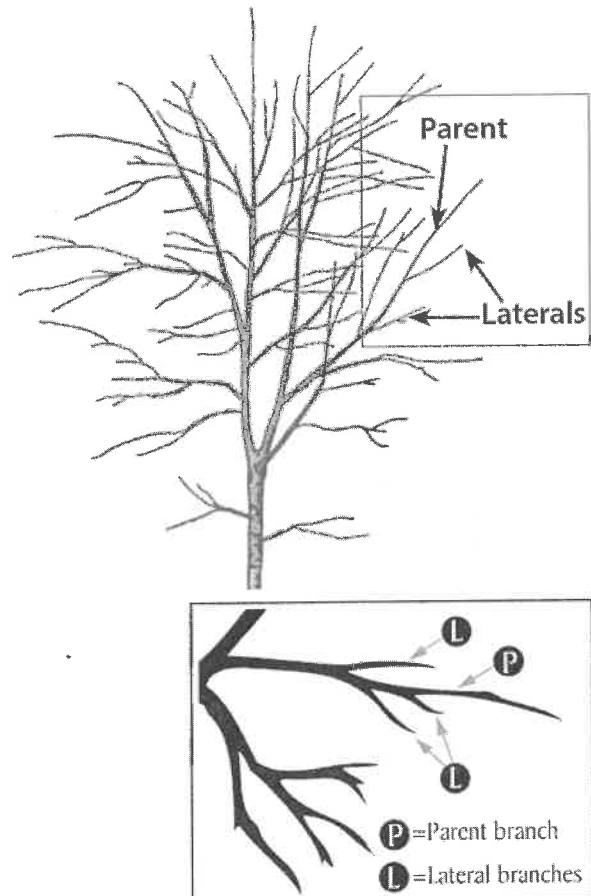


Figure 10.4
Standard branch definitions

- 10.7 cambium:** Meristematic tissue that gives rise to xylem, phloem and new cambium.
- 10.8 clean:** Arboricultural term used to describe selective pruning to remove one or more of the following: dead, diseased, infested, rubbing, declining, detached and/or broken branches.
- 10.9 clearance area:** specified area from which vegetation is to be removed.
- 10.10 client:** a person, corporation, or other entity who has hired the qualified professional.
- 10.11 climbing spurs:** Sharp, pointed devices strapped to a climber's lower legs used to assist in climbing trees (syn.: gaffs, hooks, spurs, spikes, climbers).
- 10.12 crown:** The part of a tree or shrub, measured from the lowest branch upward, including all the branches and foliage.
- 10.13 culm:** the stem of a grass or sedge, including, for the purposes of this standard, the woody, hollow aerial stem of bamboo.
- 10.14 decay:** The degradation of woody tissue caused by microorganisms.
- 10.15 directional pruning:** Selective removal of branches to guide and/or discourage growth in a particular direction.
- 10.16 espalier:** A pruning system that trains plants to grow within a plane, such as along a wall, trellis or fence.
- 10.17 flush cut:** A pruning cut that removes the branch bark ridge and/or branch collar, damaging the trunk or **parent branch**. (see Fig. 7.1.9).
- 10.18 frond:** A leaf of a palm.
- 10.19 heading:** Pruning cut that removes a branch or stem between nodes (leaving a stub), to a bud, or to a live branch typically less than one-third the diameter of the branch or stem being removed.
- 10.20 leader:** A main trunk or stem that dominates all or a portion of the crown. Trees and shrubs may have one leader or several individual leaders.
- 10.21 line of sight:** The line of vision to a specific view element (syn. sightline).
- 10.22 lion tailing:** The use of branch removal cuts to remove interior lateral branches, resulting in a concentration of growth at branch ends.
- 10.23 mechanical pruning:** Pruning with heavy equipment (not hand-held) fitted with power saws or other cutting devices (e.g. saws mounted on booms or suspended from a helicopter).
- 10.24 natural (pruning system):** A pruning system intended to maintain the tree's characteristic growth pattern and adaptations.
- 10.25 node:** Slightly enlarged portion of a stem (or branch) where shoots arise.
- 10.26 palm:** Monocotyledonous plant of the *Aracaceae* family, generally with one or more unbranched trunks, with fronds emanating from a meristem at the top of the trunk.
- 10.27 palm frond skirt:** One or more year's accumulation of dead and drooping fronds at the bottom of the canopy and along the trunk.
- 10.28 petiole:** The stalk of a leaf or frond.
- 10.29 planary form:** Shape that conforms to a geometric plane.
- 10.30 pleaching:** Pruning system that trains one or more plants to achieve a desired shape or form through a combination of pruning and interweaving or tying small branches to one another, or to a pre-formed frame.
- 10.31 pollard head:** Response growth that forms a knob or swelling at sprout removal sites on trees maintained within a pollarding pruning system.
- 10.32 pollarding:** A pruning system that maintains crown size by initial heading of branches on young trees, followed by removal of shoots to their point of origin at appropriate intervals without disturbing the resulting pollard head.
- 10.33 pruning:** The selective removal of plant parts to achieve defined objectives.
- 10.34 pruning amount:** Quantity of plant parts removed at one pruning, expressed in terms of a number of branches or other parts removed, and/

or percentage of the crown or buds removed on an entire tree or specific branches.

10.35 pruning system: Process used to achieve the desired long-term form of the plant.

10.36 qualified professional: An individual who, by reason of training and experience, has demonstrated the ability to safely and effectively perform assignments, and, where required, is properly credentialed in accordance with federal, state or local laws and regulations.

10.37 raising: Arboricultural term referring to pruning of branches to provide vertical clearance below the crown.

10.38 reduction: Arboricultural term referring to decreasing branch length, or plant height and/or spread.

10.39 reduction cut: A pruning cut that removes the larger of two or more branches or stems, or one or more codominant stem(s), to a live lateral branch, typically at least one-third the diameter of the stem or branch being removed.

10.40 rejuvenation: Removal of overmature, dead or dying stems of a shrub, near the ground, to stimulate new stem development.

10.41 remote/rural location: Undeveloped or sparsely populated area including areas of agricultural and forest land, not in direct association with dwellings or development.

10.42 removal cut, branch: A pruning cut that removes the smaller of two branches at a union, or a parent stem, without cutting into the branch bark ridge or branch collar, or leaving a stub.

10.43 restoration: Pruning to redevelop structure, form, and appearance of topped or damaged woody plants.

10.44 risk: The combination of the likelihood of an event (e.g. tree failure and impact to a target) and the severity of the potential consequences (e.g. personal injury, property damage, or disruption of activities).

10.45 shall: As used in this standard, denotes a mandatory requirement.

10.46 shearing: Cutting leaves, shoots and branches to a desired plane, shape or form, using tools designed for that purpose, as with topiary.

10.47 shoot: New stem or branch growth.

10.48 should: As used in this standard, denotes an advisory recommendation.

10.49 shrub: Woody perennial plant, usually with several stems that may be erect or close to the ground, generally smaller than a tree.

10.50 specifications: A document stating a detailed, measurable plan or proposal for provision of a product or service.

10.51 standard, ANSI A300: Industry consensus standards for the professional management of trees, shrubs and other woody plants that serve as the foundation for work specifications, training materials, quality protocols, and regulations for the management of trees, shrubs, palms, and other woody plants.

10.52 stem: A dominant leader or branch bearing buds, foliage, and giving rise to other branches and stems.

10.53 structural development pruning: Pruning to influence the orientation, spacing, growth rate, strength of attachment, and ultimate size of branches and stems.

10.54 stub: Portion of a branch or stem remaining after an internodal cut or branch breakage.

10.55 subordination: The removal of the end of a branch or stem to reduce leaf surface area, and to slow its growth relative to its parent, or to other branches or stems.

10.56 sucker: Vigorous upright epicormic shoot that arises from latent buds below soil level or the graft union.

10.57 target: People, property, or activities that could be injured, damaged, or disrupted by the failure of a tree or tree parts (see ANSI A300 Part 9, *Tree Risk Assessment*).

10.58 thinning: An arboriculture term used to describe selective pruning to reduce density of branches and foliage.

10.59 topiary: Pruning system that uses a combination of pruning, supporting, and training branches to orient a plant into a desired shape.

10.60 topping: Reduction of tree size by cutting live branches and leaders to stubs, without regard to long-term tree health or structural integrity.

10.61 tracing: The removal of loose, damaged tissue from in and around a wound.

10.62 tree: A woody perennial plant with a single or multiple trunks, which typically develop a mature size of over several inches diameter, and 10 or more feet in height.

10.63 trunk: The main or primary stem or stems of a tree.

10.64 union: Junction of branches, stems, or leaders.

10.65 utility: A public or private entity that delivers a public service, such as electricity, gas, or communications.

10.66 vine: A woody perennial plant that typically lies along the ground, or that rises above the ground by attaching to other plants or objects with tendrils or by twining.

10.67 wound: An opening that is created when the bark of a live branch or stem is cut, penetrated, damaged, or removed.

Annex A – Pruning cut guideline

This annex is not part of the ANSI A300 (Part 1)-2017 standard.

A-1 Pre-cut method

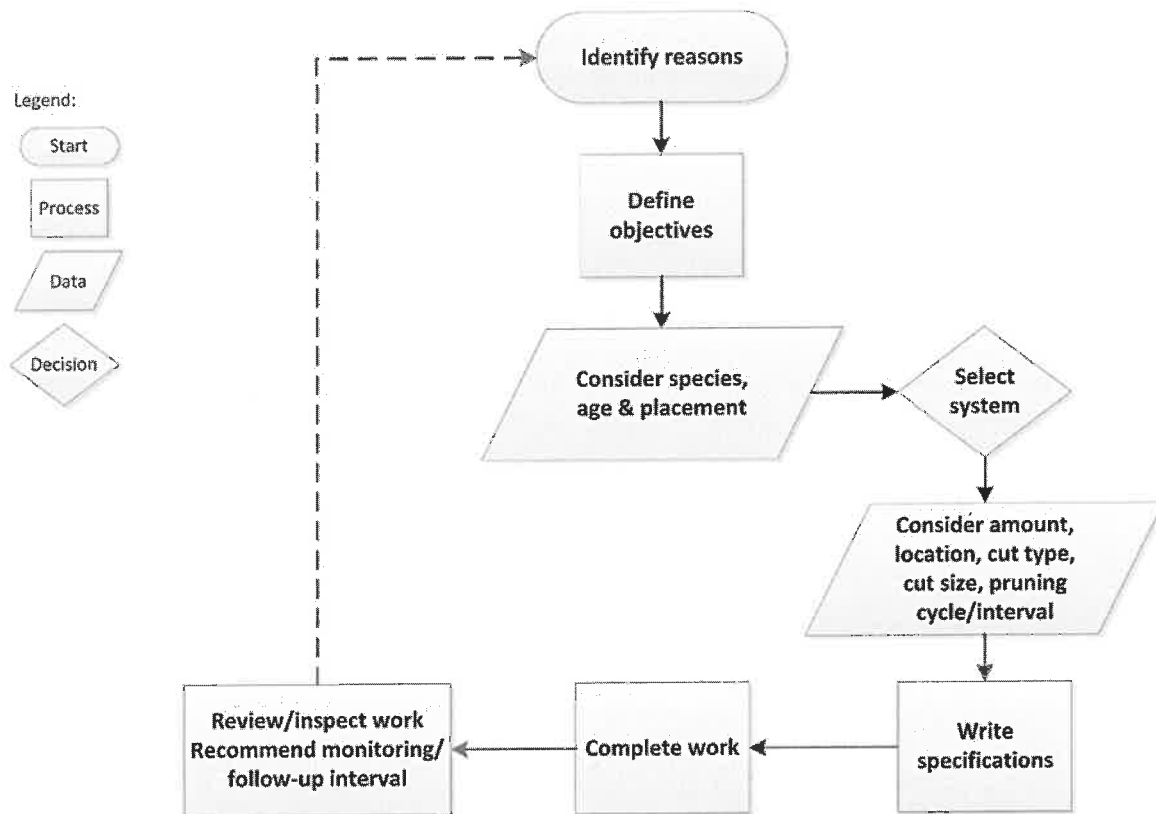
Multiple cutting techniques exist for application of a pre-cut method. A number of them may be used to implement an acceptable pre-cut method.

A-1.1 The technique depicted in Figure 7.1.2 demonstrates one example of a pre-cut method common to handsaw usage. It is not intended to depict all acceptable pre-cut method techniques.

Annex B – Specification writing guideline

This annex is not part of the ANSI A300 (Part 1)-2017 standard.

Pruning Process Flowchart



Clearly written specifications ensure that objectives are communicated and understood. Pruning specifications must address individual plant, site and client requirements. Multiple objectives, or combinations of objectives, may be specified when pruning individual plants or groups of plants.

Once pruning objectives are established for a plant, a pruning system may be specified. The examples below provide brief explanations of common pruning objectives, and guidance in writing specifications to achieve those objectives. While these examples cover many scenarios, they do not include all possible objectives, systems, combinations, or pruning solutions.

B-1 Mitigate risk

Prune to lower the likelihood of tree, branch, and/or other tree part failure and impact to targets (see ANSI A300 Part 9, *Tree Risk Assessment*).

Specification Guidelines

- Reduce or remove branches, leaders and/or other parts (living or dead) to lower or eliminate risk (*specify condition of concern, amount to be pruned, types, sizes and locations of pruning cuts, and monitoring interval*).
- In addition to pruning, consider supplemental support if appropriate (see ANSI A300 Part 3, *Supplemental Support Systems*).

B-2 Manage health

Prune to improve or maintain plant health, or control pests (see ANSI A300 Part 2, *Soil Management* and ANSI A300 Part 10, *Integrated Pest Management*).

Specification Guidelines

- Remove deleterious parts, e.g. branches that are dead or dying, diseased or infested, rubbing, weakened or broken, or parasitic plants, etc. (*specify condition of concern, types, sizes and locations of cuts, and monitoring interval*).
- Take appropriate precautions if necessary to prevent the spread of pests, e.g. seasonal timing, sterilization of tools, handling/disposal of debris/by-products.

B-3 Develop or improve structure

Prune to improve plant architecture (i.e. optimum branch size, spacing, diameter and aspect ratios), ensure compatibility with site (e.g. conflict with traffic, line-of-sight or the built environment), or to restore damaged plants. Initiate structural pruning early to enhance benefits and value, and reduce long-term costs and potential for failure.

Specification Guidelines

- Develop dominant leader(s) and desirable scaffold branches appropriate for the species and site (*specify leaders and branches to be retained and developed*).
- Subordinate or remove competing leaders, branches and shoots. If necessary, subordinate larger branches over multiple growing seasons to avoid making cuts with large aspect ratios and to avoid removing excessive amounts of material (*specify competing leaders and branches to be subordinated or removed, and appropriate maintenance interval*).

B-3.1 Restoration pruning

Prune to redevelop or improve structure, form, and appearance following damage from storms, vandalism, lion tailing, topping or other substandard pruning, or other causes.

Specification Guidelines

- Assess trees for risk if necessary prior to beginning restoration pruning (see ANSI A300 Part 9, *Tree Risk Assessment*).
- Retain suitable leaders, branches and shoots to be developed (*specify parts to retain and develop*).
- Reduce, subordinate and/or remove competing or undesirable parts (*specify parts to be removed, and types, sizes number and locations of cuts*).
- Follow process outlined in B-3, pruning to develop or improve structure.

B-4 Provide clearance

Prune to prevent interference with infrastructure, buildings, traffic, lines-of-sight, desired views, or other plants; also to ensure safe and reliable utility services, raise crowns, provide access to sites, and comply with regulatory and other requirements as necessary.

Specification Guidelines

- Determine clearance amount according to intended site use, planned maintenance interval, and characteristic form of the plant, including shape, growth rate and likely growth response following pruning (*specify reason for clearance, clearance distance, and/or branches and leaders to be removed, and/or types, sizes and locations of cuts*).
- Use directional pruning to encourage growth away from the specified clearance area and to develop compatible and stable structure (*specify location of branches to be retained, and an appropriate maintenance interval*).

B-5 Manage size and/or shape

Prune to reduce size or maintain desired shape.

Specification Guidelines

- Consider species and typical form, ability to tolerate the amount of pruning required, location, current condition, and other characteristics such as cultivar, failure profile, growth rate and expected growth response following pruning.
- Selectively reduce, shear or remove branches, leaders or other parts to achieve or maintain a desired form, shape or size (e.g. topiary system) or to encourage regenerative growth from lower parts of the crown (*specify parts to be reduced or removed and/or types, sizes number and locations of cuts, and an appropriate maintenance interval*)

B-5.1 Retrenchment (Regenerative) Pruning

Retrenchment is a natural process whereby older trees gradually shed overextended, decayed, damaged, or declining branches and leaders, and redirect energy into epicormic growth from interior and lower portions of the crown. Depending on species and site conditions, this process may occur over many years, decades or centuries.

Retrenchment pruning mimics the natural process of retrenchment by making prescriptive pruning cuts to remove declining branches, reduce risk of failure, stimulate new shoots on interior and lower branches, and restore tree vitality and appearance. Resulting new growth is subsequently managed to guide future structural development. Arborists should determine whether retrenchment pruning is appropriate, considering factors such as species, condition, placement, aesthetics, and expected response.

Perform retrenchment pruning to preserve and maintain trees in the landscape, especially those of high value or special heritage.

Specification Guidelines

- Selectively reduce, remove or head branches that are dead, senescing, damaged, or that pose unacceptable risk (*specify condition of concern, types, sizes and locations of cuts*).
- Minimize the size of cuts on living wood whenever possible (preferably less than 6-inches in diameter).
- Maintain and monitor branches or leaders that do not pose unacceptable risk (*specify branches and leaders to be retained, and monitoring interval*).
- After retrenchment pruning, follow process outlined in Restoration pruning, (B-3.1).

B-6 Improve aesthetics

Prune to improve the visual appearance of plants and/or the surrounding site.

Specification Guidelines

- Selectively reduce or remove branches, leaders or other parts to achieve aesthetic objectives (*specify parts to be removed and/or types, number, sizes and locations of cuts, and an appropriate maintenance interval*).

B-7 Manage production

Prune to optimize production or desired characteristics of fruit, floral, timber, canes or other products.

Specification Guidelines

- Selectively remove branches or other parts to achieve desired production levels (*specify parts to be removed and/or types, sizes, number and locations of cuts, and optimum maintenance interval*).
- Consider seasonal timing of pruning, as well as species and cultivar characteristics.

B-8 Rejuvenation of Shrubs

Prune to stimulate new growth, restore desired form, and/or to remove dead, damaged, diseased or infested parts.

Specification Guidelines

- Consider species and typical form, current condition, seasonal timing, and ability to tolerate rejuvenation pruning
- Reduce or head branches or leaders at or near ground level (*specify location of cuts, branches/leaders*)

to be removed).

B-9 Manage Wildlife Habitat

Pruning activities may affect wildlife, either directly through disturbance, or by manipulation of habitat such as food supplies, cover, nesting or roosting sites. Pruning activities may also violate certain regulations, including the federal Migratory Bird Treaty Act, the Endangered Species Act and other federal, state and local regulations. Arborists should be aware of regulations, and modify work procedures as appropriate to avoid disturbing, injuring or killing protected wildlife.

Pruning to improve, conserve or manipulate wildlife habitat may be part of an overall strategy across an entire property, park, right-of-way or other management area. The practice may involve multiple pruning objectives and/or various pruning systems, and may include other strategies beyond the scope of a pruning standard.

Specification Guidelines

- Specify retention or enhancement of desired wildlife features that do not pose unacceptable risk, such as perches, cavities or other nesting sites (*specify features to retain or enhance, parts to be removed, and types, sizes and locations of cuts*).
- Prune to stimulate growth, cover, fruit or seed production (*specify branches to be pruned or retained, and seasonal timing appropriate for species*).

Annex C – Applicable ANSI A300 interpretations

This annex is not part of the ANSI A300 (Part 1)-2017 standard.

The following interpretations apply to ANSI A300 (Part 1)-2017 *Pruning*:

C-1 Interpretation of “should” in ANSI A300 standards

“An advisory recommendation” is the common definition of “should” used in the standards development community and the common definition of “should” used in ANSI standards. An advisory notice is not a mandatory requirement. Advisory recommendations may not be followed when defensible reasons for non-compliance exist.

C-2 Interpretation of “shall” in ANSI A300 standards

“A mandatory requirement” is the common definition of “shall” used in the standards development community and the common definition of “shall” used in ANSI standards. A mandatory requirement is not optional and must be followed for ANSI A300 compliance.

Annex D – Additional explanation of objectives, evolving concepts, explanation of material removed from previous versions

This annex is not part of the ANSI A300 (Part 1)-2017 standard.

ANSI A300 Part 1 was revised in 2008, and that revision was reaffirmed in 2014, while the Standard underwent further review and revision. The 2017 revision includes many changes, including a restructuring of sequence, addition of new terms, and removal of certain sections. The following provides an overview of these changes, and additional guidance in application of ANSI A300 (Part 1)-2017 *Pruning*.

D-1 Restructuring of A300 Part 1, *Pruning*

The 2017 revision restructured A300 Part 1 to better match work flow in the field, and to improve the writing of specifications. ANSI A300 (Part 1)-2017 *Pruning* follows this general structure:

1.	A300 Standard	All parts
2.	Part 1, Pruning standard	
	• Purpose	What A300 Part 1 is for
	• Reasons for pruning	Why the plant should be pruned?
	• Implementation	Using the standard
	• Safety	ANSI Z133 and other safety rules
3.	Normative references	Additional standards that apply
4.	Objectives	What pruning will accomplish
5.	Pruning systems	How the plant will be maintained over time
6.	Pruning specifications	How the work will be done to meet the objective
7.	Pruning cuts	Explains basic information, including different types of pruning cuts
8.	Pruning practices	Amount of pruning, additional guidelines and details, site specific information, disposal methods, monitoring/maintenance interval
9.	Palm pruning and similar plants	Specific guidelines for pruning palms and similar plants
10.	Definitions	Defines commonly used arboriculture terms in this document

D-2 Introduction of pruning systems

The 2017 revision recommends that arborists specify a “pruning system” to achieve and/or maintain the desired long-term form of the plant (5.1). Various pruning systems have been used to improve results in horticulture and fruit production, some dating back many centuries. Though not required, specifying a pruning system can clarify specifications and ensure that client or owner expectations are met.

Part 1 recognizes five pruning systems:

1. Natural

The natural system is most commonly used for trees, and generally conserves the characteristic growth pattern and adaptations of the plant. However, the natural system allows for pruning to develop preferred structure and branch architecture, and to avoid conflict with infrastructure, lines of sight, vistas, etc. The natural system can be applied to either trees in a woodland setting or those in an open planted landscape. Indeed, trees adapt in unique ways to their surroundings; for example, trees of the same species assume different forms depending on site factors, including terrain, and the presence of other trees or other nearby landscape features.

2. Pollarding

A pollarding system is used to maintain trees in a predetermined size, first by heading and removing branches to establish desired form, followed by periodic removal of shoots back to the original heading cuts. Annual shoot removal is most appropriate, but an interval of up to three years is acceptable depending on species, climate, and growth rates. The terms “pollarding” and “topping” are sometimes confused; it should be clear that pollarding is a carefully planned pruning system that requires routine maintenance, whereas topping is less discriminate and is not an acceptable pruning practice. Pollarding is distinguished from topping in several ways, including:

- Pollarding is performed only on plants of appropriate size, species and age (typically young). Only sapwood is cut.
- Pollarding is initiated relatively early in the life of the plant (e.g. the first 10 percent of expected life span).
- The interval for maintaining a pollarded tree should never exceed three years.
- Branch removal cuts are made to remove shoots. These are made back to, but without damaging, the pollard head that develops at the site of the original heading cuts.

3. Topiary

Topiary systems use one or more pruning cut types alone or in combination, most commonly to maintain shrubs in desired form. The topiary system may be used on trees that respond well to frequent pruning; however, maintaining entire trees in topiary form is expensive and relatively uncommon.

4. Espalier

Espalier dates back to Roman times, and consists of training plants to grow in a planary form, such as against a wall, fence, or trellis. This system is commonly used to optimize limited space, and to add visual interest. Espalier requires frequent pruning and tying back new shoots to maintain plants in the desired form.

5. Pleach

Pleaching uses a combination of pruning, interweaving and tying plants to one another, or to a frame, to achieve a desired form. Pleaching can be used to create an allée, archway, or other living structure. As with espalier, pleaching requires frequent pruning, interweaving and tying back new shoots to maintain plants in the desired form.

Selecting a pruning system represents a commitment to maintain the plant in a certain form over time. Maintenance intervals may vary considerably depending on the system and type of plant. For example, many topiary, espalier and pleaching systems require maintenance several times annually, whereas intervals for some natural systems may vary from twice annually to several years.

D-3 Removal of clause 7, Pruning methods (types)

The 2008/2014 version/reaffirmation clause 7 for *Pruning methods (types)* required arborists to specify “...one or more of the following pruning methods to achieve the objective,” and included “Clean,” “Raise,” “Reduce” and “Thin.”

The 2017 revision takes a different approach, emphasizing the actual work flow, to include objectives, system, what and how much to prune, and types, sizes and/or locations of cuts. To reflect this change, the revision removes the *Pruning methods (types)* clause; however, removing this clause from A300 does not preclude the use of these terms in the writing of work specifications.

Clean

The term “clean” no longer appears in the body of the standard, but the removal of “non-beneficial parts” is still included under the objectives of “Manage risk” and “Manage health” (with references to A300 Part 9, *Tree Risk Assessment* and A300 Part 10, *IPM*). “Clean” remains as a defined term (10.8).

Thin

The term “thin” no longer appears in the body of the standard. Consensus was that “thinning” was frequently misunderstood, and was often overprescribed, or used to justify poor practice such as lion tailing. If “reducing the density of live branches” is required, for example, to manage health, or to increase light penetration, it can be specified as such. “Thinning” remains as a defined term (10.58).

Raise

The term “raise” is included in the 2017 revision under subclause 4.2 *Objectives*, and as a defined term (10.37).

Reduce

The term “reduce” is included in the 2017 revision under subclause 6.3 as a type of cut (“reduction cut”) and as a defined term (10.38).

D-4 Greater inclusion of landscape considerations, including shrubs

The revision was carefully reviewed to ensure that language was applicable to woody plants other than trees whenever appropriate. Additional terms and processes pertinent to the care of shrubs have been incorporated into the standard.

D-5 Addition of names and descriptions of pruning cuts

Clause 6 of the revision now names, describes and defines four types of pruning cuts, including “branch removal cut,” “reduction cut,” “heading cut,” and “shearing cut.”

D-6 Amount of pruning

Objectives subclause 6.1.4 of the 2008/2014 version/reaffirmation stated: “Not more than 25 percent of the foliage should be removed in an annual growing season. The percentage and distribution of foliage to be removed shall be adjusted according to the plant’s species, age, health and site.” In addition, the *Pruning methods*, *Thinning* subclause 7.5.2 stated “Not more than 25 percent of the crown should be removed within an annual growing season.” These were both advisory “should” statements, with the understanding that 25 percent may be too much or too little, depending on the tree and the objectives.

The second part of subclause 6.14 contains a “shall” statement (“...shall be adjusted”) requiring the arborist to “adjust” for individual factors (“species, age, health and site”). For example, 25 percent might be excessive for a mature tree; or 25 percent might be inadequate to achieve safe clearance from energized conductors. Though not the intent, 25 percent was often considered to be the maximum allowable amount regardless of other factors.

There was also concern about the accuracy of estimating or measuring 25 percent of “foliage” or “crown,” and whether subclauses 6.14 and 7.5.2 were in conflict due to the difference in wording.

The 2017 revision removes the 25 percent guideline, and provides the arborist with the flexibility to exercise professional judgment in determining pruning amount based on “*species, size, age, condition, and site*.” The pruning amount can be expressed as an estimated percentage of foliage to be removed from certain locations, number of pruning cuts of certain sizes or types, or by other means. In addition the revision makes the following recommendations:

- Specify what to remove (e.g. live branches), including location, size range, and/or type of cuts.
- Remove no more living material than what is necessary to achieve specified objectives.

Encourage good balance and structure by retaining lower and interior branches when compatible with objectives.

D-7 Removal of Utility pruning clause

The 2008/2014 version/reaffirmation of A300 Part 1, as well as earlier versions, included a separate section for utility work (2008/2014, clause 9 *Utility pruning*). Upon review, it was evident that the work described in this section (clearance pruning, directional pruning, mechanical pruning, emergency work, etc.) often applies in settings other than electric utility line clearance. For this reason, the decision was made to incorporate utility pruning into the standard while retaining all of the key information, including:

- References to ANSI Z133, OSHA regulations, qualified line clearance tree trimmer, location of utilities, etc. (2.4).
- Clearance objectives such as safe and reliable utility service, preventing interference with infrastructure, providing access, and regulatory compliance (4.2).
- Inspection exemption for conditions outside of the scope of work (8.1).
- Directional pruning to promote growth away from clearance area (8.6.1).
- Cut beyond mandated clearance distances at an appropriate branch union (8.6.2).
- Consider relocation, treatment with growth regulators or removal and/or replacement for trees requiring excessive pruning (8.6.3).
- Mechanical pruning (8.7).
- Emergency operations (8.12).

It should be noted that A300 Part 1 has no separate sections for other specialized pruning, such as municipal or landscape; however, it is expected that bulletins, best practice guides, and other interpretive publications targeted at various end-user groups will continue to be developed using ANSI A300 standards as guidance.

D-8 Discussion of terms

D-8.1 Remote/Rural

In general, the term “Remote” includes off-road areas away from any dwellings or development; and furthermore, not part of areas such as parks or other designated protected areas. In general, “Rural” includes agricultural or forested lands, and land along roads in these areas, but excludes settlements, villages, and the yards and grounds of dwellings. There are many local, specific factors that help determine if an area is remote/rural or not.

D-8.2 Climbing spurs

The use of climbing spurs (also known as spikes, hooks, or gaffs) remains controversial as an arboricultural practice. Spurs can damage trees and pose safety risks to the user. While there is general agreement that arborists should reduce or eliminate the use of spurs when pruning, there remain circumstances where their use may be necessary. The following provides greater detail about where the use of climbing spurs may be acceptable under A300 Part 1.

1. *Remote or rural utility rights-of-way* (see D-8.1). On utility rights-of-way, in these locations, the use of spurs on trees of relatively low value is tolerated. In any such circumstance, utility arborists should defer to landowner preference.
2. *When branches are more than throwline distances apart and there is no other means of climbing the tree.*

While practically any tree can be climbed without using spurs, trees may pose exceptionally challenges beyond the technical skills and equipment possessed by many arborists. In such cases, where safety is a concern, arborists may use spurs; however, once they have accessed the work, they should tie in and complete the work without spurs. Regardless, arborists must consider factors such as public perception and the potential impact on tree health prior to making the decision to use spurs.

3. *When the outer bark is thick enough to prevent damage to the inner bark or cambium.*
If the damage caused by the use of spurs are minimal or insignificant due to bark characteristics, the tree owner fully understands the situation, and there are no additional concerns (e.g. public perception), the most practical means of accessing the tree may be to use spurs.

D-8.3 Sucker, shoot, sprout, and watersprout

The term “sucker” is often used to refer to shoots or sprouts arising from anywhere on a tree; however, it is technically a horticultural term that refers to shoots arising exclusively from roots, especially the rootstock of grafted plants. Correct terms for shoots that originate from above the roots or graft line include “watersprout,” “epicormic sprout,” or “epicormic shoot.” “Sprout” and “shoot” are synonymous.

The term “shoot,” which is defined as “new stem or branch growth on a plant,” covers all of these terms. Given this, A300 Part 1 defaults to the term “shoot” when referring to new growth. Arborists may use any of these terms in writing specifications, however they are encouraged to use correct terminology (see *Annex glossary*, D-9).

D-8.4 Coppicing, rejuvenation, and retrenchment pruning

Rejuvenation is most often performed to restore the appearance of shrubs in a landscape setting. *Coppicing* refers primarily to the practice of cutting trees or shrubs to the ground for the purpose of encouraging new sucker growth from the roots, for any purpose. *Retrenchment pruning* applies to trees, and is carried out on a larger scale and over a longer time frame than rejuvenation or coppicing.

D-9 Annex glossary

The following terms appear in the ANSI A300 (Part 1)-2017 Annex but are not considered part of, and are not included in the body of, the ANSI A300 (Part 1)-2017 standard:

aspect ratio: The size of a branch or stem relative to its parent, measured just beyond the union.

coppicing: Cutting trees close to ground level with the intention of encouraging regrowth of multiple shoots.

retrenchment: Process by which older, declining or senescing trees shed branches and leaders and redirect energy into epicormic shoots arising from interior and lower portions of the crown.

retrenchment pruning: Prescriptive reduction or removal of dead, damaged, or senescing branches and leaders, performed to restore tree vigor and appearance, reduce risk, stimulate new growth and preserve trees.

sprout: Syn. = shoot (10.47).

vista/view prune: Pruning to enhance a specific view.

watersprout: Upright, epicormic shoot arising from the trunk or branches of a plant above the root graft or soil line. Incorrectly called a sucker.

Annex E – Urban forest products chart

This annex is not part of the ANSI A300 (Part 1)-2017 standard.

Higher proportion of suitable by-products Less processing complexity and equipment		Moderate proportion of suitable by-products Moderate processing complexity and equipment		Lower proportion of suitable by-products More processing complexity and equipment				
End Uses ¹	Compost	Fuel Chips	Mulch ²	Firewood ³	Timbers and all other uses	Pallets, Crates, Packaging, & Industrial Uses	Novelty and custom woodworking	Lumber, Cabinetry, Furniture, Millwork, Flooring, Gifts
End Users	Residents, general public, local school & park districts, businesses, institutions & government	Power plants, export	Residents, general public, local school & park districts, businesses, institutions & government	Residents, general public	All	Construction contractors, manufacturers, bulk shippers	Landowners, residents, general public, local school & park districts, businesses, institutions & government	General public, businesses, institutions & government
By-product Form ⁴	Chips & Ground Material			Stumps, Branches, & Log Segments	Timbers & Whole Trees	Merchantable Logs (Min: 8" long 12" diam. ⁵)	Logs, Branches, Burls, Crotches, etc.	Merchantable Logs (Min: 8" long 12" diam. ⁵)
Quality ⁶	All			Commercial species, ash requires special treatment	All	Grades 1-3	High grade, character, or figured wood, often with special provenance	Grades 1 & 2
Species	All			Commercial species, ash requires special treatment	All	High	Varied species, including noncommercial	Commercial hardwood & softwood species
Quantity	High	High	High	High	High	High	Very low	High
Users ⁶	Compost producers, reclamation yards, landscaping firms	Reclamation yards, biomass energy companies	Mulch producers, reclamation yards, landscaping firms	Firewood producers ⁷	Reclamation yards, combined mulch operators, timber framers	Log buyers, small sawmills, or pallet/container mills	Small, typically portable, band mills	Log buyers, industrial saw mills
Finding users	State forestry department, directors, Urban Forest Products Alliance		State forestry department, directors, Urban Forest Products Alliance	State forestry department, directors, Urban Forest Products Alliance	State forestry department, state forestry trade associations, USDA Forest Service staff, university forestry departments			
Recommended processing by arborists ⁸	Material sorting, chipping or grinding to set dimensions			Sorting by species	Note	Accumulation of semi-loads	Sorting by species	Accumulation of semi-loads
Processing equipment arborists likely need ⁹	Chipper or grinder					Chain or hand saw		
Loader, trailer or other hauling equipment								

(1) Potential products not included in this chart include: veneer, wood pellets, animal bedding, clean fill, engineered wood, sawdust, and carbon storage.

(2) Playground mulch must be free of metal.

(3) Firewood from quarantined areas requires additional treatment, necessitating a kiln, temperature monitors, and data collection equipment. Movement from quarantined areas can only legally occur through an agreement with USDA APHIS PPQ.

(4) Transport of by-products needs to be in compliance with quarantine zone requirements. See USDA APHIS PPQ for more information: <http://www.aphis.usda.gov> and relevant state departments of agriculture.

(5) See Annexes D, F, G, and H for more information on evaluating the quality of by-products.

(6) The next entity on the supply chain after arborist to use by-product. See also definition in standard.

(7) Legitimate vendors follow federal and state firewood regulations. See <http://www.americalastborer.info/firewood/cfm#hash%20dplyof%20dabs>.

(8) These suggestions are guidelines. Who does what processing needs to be negotiated. Understanding processing, sorting, and storage requirements prior to harvest is critical. Users may want multiple types of by-products.

(9) In addition to equipment, staffing and storage need to be considered. Metal detection equipment is often useful.

(10) Minimum sizes given are general guidelines for hardwoods at most typical sawmills. Some users may exist for smaller logs; larger logs will yield more uses.

ANSI A300 (Part 1) - 2017 Pruning



A300P1_2017

Section 4

Climate Resiliency

Tree Palette

The City-approved tree palette is the primarily guiding document for the selection of trees.

Insert text and San Diego's tree palette which the City of Santee wants to adopt.

The nursery trade has introduced many new cultivated varieties of trees in recent years, and several types can be utilized in the City while keeping close to the approved list. By using specific cultivated varieties developed to improve resistance to pests and diseases, the community can preserve uniformity of species and aesthetics. An example of this concept would be using the various varieties of the Maidenhair Tree, (*Ginkgo biloba*) on certain streets where it is specified and designed. The 'Autumn Gold' variety of Ginkgo is an upright grower becoming spreading with age that requires minimal maintenance.

The community is encouraged to review the approved plant list at least every five years to determine if certain species should still be used in the landscape to achieve aesthetics goals and preserve the overall design. Underperforming species should be eliminated, and a substitute species should be introduced in consultation with a certified arborist or horticulturalist.

Planting Plan

As of October 20, 2021, there are 2,437 vacant sites where a tree was located but was removed, or where a tree could be planted. The vacant site list and map should be used to plan tree planting when funds are allocated for this work type. These sites are scattered throughout the community. By qualifying each vacant site to ensure a tree can be planted at that location that will help the City meet its canopy cover goal, the City staff will know exactly where to quickly plant and grow its urban forest.

Insert the planting plan here.

Reduction of Heat Island Effects

Insert text here.

Planning, Development, and Infrastructure

Insert text here.



Sustainability

Add more text here specific to Santee.

Section 5

Public Participation

Education-Tree City USA

A thriving urban forest provides multiple benefits for the community. To maximize those benefits cities must educate the public on the importance of proper tree care and the need to plan for tree canopy coverage for future generations. By doing so the City gains advocates for the urban forest program and the public becomes actively engaged.

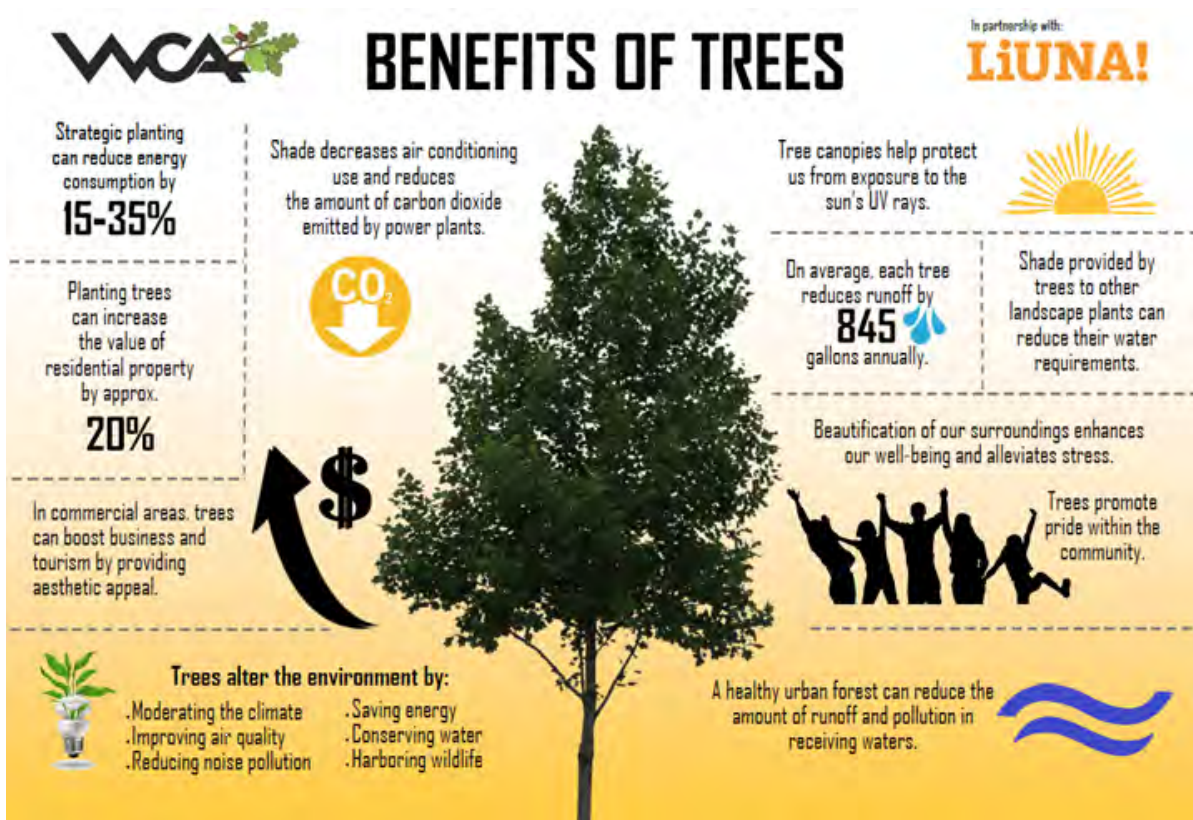
The City of Santee acknowledges that trees are vital to human health. Studies by university researchers have found a correlation between tree-filled neighborhoods which are safer and more sociable, and lower levels of domestic violence. Green landscapes naturally reduce stress, decrease the need for medication, and speed recovery times. The environmental benefits are substantial as well. Urban forest trees capture rainwater and reduce runoff, reduce the heat island effect, and greenhouse gas emissions. The City strives to maintain an environmentally conscientious landscape that includes well-maintained trees that beautify the City for residents and visitors alike.

The City is a Tree City U.S.A. through the Arbor Day Foundation, which is one of the best ways to highlight the City's trees. This UFMP seeks to assist the City by providing basic educational information on trees and encourages staff to find creative ways to protect the trees in the urban forest.

A healthy forest means the community as well as individuals save money as the environment improves. Well-placed trees can help save up to 35% in annual air conditioning costs and 10-25% of winter heating. Large, well-maintained trees can add 20% or more in property value and each large tree adds 1% to the sale of a home. 100 mature trees could catch up to 100,000 gallons of rainwater per year, which means less money spent on stormwater control and cleaner water downstream to the ocean. From an air quality standpoint, 100 trees remove about 1,000 lbs. of pollutants per year, including 400 lbs. of ozone, 300 lbs. of particulates, and 5 tons of carbon dioxide, an important concern in climate change. All of these are positive effects on the quality of life that are critical to a community's long-term well-being.

From an economic standpoint, trees are a wise investment in community resources. As a part of the community infrastructure, they have a positive impact in the business and tax base. In tree-lined commercial districts, there is more frequent shopping, longer shopping trips, and shoppers tend to spend more for goods and parking. As trees mature and need care, jobs are created which benefits the tax base even further.

The City of Santee can ensure that its trees survive to shade and benefit the community and region by supporting local volunteer organizations that actively participate in tree planting. Adequately funding programs for the maintenance and care of trees helps neighborhoods retain the character and vision of the City and ensures a positive community legacy.



WCA **BENEFITS OF TREES** In partnership with: **LiUNA!**

Strategic planting can reduce energy consumption by **15-35%**

Planting trees can increase the value of residential property by approx. **20%**

In commercial areas, trees can boost business and tourism by providing aesthetic appeal.

Shade decreases air conditioning use and reduces the amount of carbon dioxide emitted by power plants.

Tree canopies help protect us from exposure to the sun's UV rays.

On average, each tree reduces runoff by **845** gallons annually.

Shade provided by trees to other landscape plants can reduce their water requirements.

Beautification of our surroundings enhances our well-being and alleviates stress.

Trees promote pride within the community.

Trees alter the environment by:

- .Moderating the climate
- .Improving air quality
- .Reducing noise pollution
- .Saving energy
- .Conserving water
- .Harboring wildlife

A healthy urban forest can reduce the amount of runoff and pollution in receiving waters.



Tree Ordinance

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Chapter 8.06

URBAN FORESTRY

Sections:

8.06.010	Title.
8.06.020	Purpose and intent.
8.06.030	Definitions.
8.06.040	Determination of definitions.
8.06.050	Jurisdiction.
8.06.060	Designate administrative responsibilities.
8.06.070	Protection of trees.
8.06.080	Responsibilities of property owners.
8.06.090	Responsibilities for removing trees for newly aligned curbs, gutters, sidewalks and water/sewer laterals.
8.06.100	Tree maintenance by public utilities.
8.06.110	Trimming, pruning or removal—Permit required.
8.06.120	Trimming, pruning or removal—Permit application.
8.06.130	Trimming, pruning or removal—Permit issuance or denial.
8.06.140	Trimming, pruning or removal by City.
8.06.150	Planting—Permit required.
8.06.160	Planting—Permit application.
8.06.170	Planting—Permit issuance or denial.
8.06.180	Removal of protective structures.
8.06.190	Exemption from Solar Shade Control Act.
8.06.200	Tree service contractors.
8.06.210	Emergency tree services.
8.06.220	Topping prohibited.
8.06.230	Local government disclaims liability.
8.06.240	Interference with planting, maintenance, and removal unlawful.
8.06.250	Appeals.
8.06.260	Enforcement.

8.06.010 Title.

This chapter is known as the “City of Santee Urban Forestry Ordinance.” (Ord. 561 § 3, 2019)

8.06.020 Purpose and intent.

This chapter sets forth tree-related policies, regulations, and generally accepted standards for planting, trimming, and removing trees on public property and public rights-of-way. Additionally, this chapter sets forth policies relating to trees planted as a condition of residential, industrial and commercial development. The provisions of the chapter are enacted to:

- A. Ensure that the City will continue to realize the benefits provided by generally accepted practices of urban forestry;
- B. Clarify property owners’ basic responsibilities to ensure that trees on public rights-of-way are recognized as part of the community’s urban forest and those trees are not arbitrarily removed or damaged;

- C. Identify the Department of Community Services as the City department responsible for the care of public trees throughout the City; identify the Director as the responsible City administrator for authorizing public tree removal;
- D. Maintain the optimal amounts of practical tree cover on public parks and open space lands within the City;
- E. Maintain the City's commitment to generally accepted Tree City USA status and Growth Award status as designated by the National Arbor Day Foundation and the California Department of Forestry and Fire Protection;
- F. Maintain appropriate diversity of tree species and age classes to provide the community with a stable and sustainable urban forest environment;
- G. Assign the Director to make recommendations regarding tree maintenance and landscaping decisions, promote generally accepted International Society of Arboriculture practices and standards within the City;
- H. Maintain the practice of managing trees on public rights-of-way in a manner that does not damage, obstruct, or interfere with public improvements;
- I. Manage the planting of trees on public rights-of-way on residentially classified streets;
- J. Maintain the practice of requiring tree removal permits for the removal of trees on public rights-of-way;
- K. Develop and maintain a street tree master plan, including a list of trees approved for use in the right-of-way. (Ord. 561 § 3, 2019)

8.06.030 Definitions.

Words and phrases in this chapter have the common and usual meaning except as defined below or elsewhere in this code.

“Director” means the Director of Community Services or designated representative.

“Native tree” means any tree of the following species: Coast Live Oak (*Quercus agrifolia*), Canyon Live Oak (*Quercus chrysolepis*), Englemann Oak (*Quercus engelmannii*), and California Sycamore (*Platanus racemosa*), and any tree identified as native to southern California.

“Parks and landscape maintenance supervisor” means the Director's representative who is responsible for landscaping within the City and for administration of this chapter.

“Parkway” means the portion of the public right-of-way located between the sidewalk and the curb.

“Private trees” means trees whose trunks are located upon privately owned property and those trees whose trunks are located upon property owned by a public entity other than the City.

“Protected tree” means the coast live oaks on the property defined in the definition for “native tree.”

“Public highway” means any public street, public way, or public place in the City either owned by the City or dedicated to the public for purpose of travel.

“Public trees” means both trees growing on City-owned property and trees planted by the City growing on public rights-of-way or landscape maintenance districts.

“Shrubs” means a bush or a plant more than 12 inches but not more than six feet tall.

“Street classification” means the name attributed with a set of street and road characteristics listed in the circulation element of the Santee General Plan.

“Street tree” means a tree which the parks and landscape maintenance supervisor has designated as appropriate for planting within the public right-of-way for the particular portion of the public right-of-way in question and is on the approved street tree list.

8.06.040

“Topping” means the severe cutting back of limbs to stubs larger than three inches in diameter, within the tree’s crown, to such a degree as to remove the tree’s natural canopy and/or severely disfigure the tree’s appearance.

“Tree” or “trees” means any individual or group of self-supporting woody perennial plant or plants growing with a single or multi-stemmed trunk supporting a crown of branches.

“Trees growing on public property” means trees whose trunks are located in whole or in part on property owned by the City.

“Trees growing on public rights-of-way” means trees whose trunks are located in whole or in part on property in which the City owns an interest for purposes of vehicular, pedestrian, equestrian, or City utility use. Trees growing on public rights-of-way include both public and private trees growing on public rights-of-way.

“Trees in public places” means trees growing on public property and trees growing on public rights-of-way. (Ord. 561 § 3, 2019)

8.06.040 Determination of definitions.

The Director has the right to determine whether any specific woody plant is considered a tree or a shrub. Such determination is final and not subject to appeal. (Ord. 561 § 3, 2019)

8.06.050 Jurisdiction.

The City has control of all trees, shrubs, and other plantings now or hereafter in any street, park, public right-of-way, landscape maintenance districts or easement, or other City owned property within the City limits, and has the right, but not the duty, to plant, care for, maintain, remove, and replace such trees, shrubs and other plantings. (Ord. 561 § 3, 2019)

8.06.060 Designate administrative responsibilities.

The Director, by use of City employees or private contractors, has the right, but not the duty, to plant, maintain and otherwise care for, or if necessary, remove, any and all trees in public places in the City. The responsibilities of the parks and landscape maintenance supervisor include, but are not limited to, the following:

- A. Prepare an annual program for tree planting and tree care in public places of the City;
- B. In coordination with the Department of Development Services, recommend to the City Council changes or additions to the master street tree plan;
- C. Develop maintenance standards as they relate to street trees and trees in public places;
- D. Inspect the planting, maintenance and removal of all trees in public places;
- E. Make a determination to remove trees in public places;
- F. Review all landscaping plans as they affect trees in public places. (Ord. 561 § 3, 2019)

8.06.070 Protection of trees.

- A. It is unlawful for any person to:
 1. Remove, trim, prune or cut any public tree or tree growing on public rights-of-way unless such work conforms to City standards;
 2. Interfere, or cause any other person to interfere, with employees or contractors of the City who are engaged in planting, maintaining, treating or removing any tree in public places or removing any material detrimental to the tree;

3. Willfully injure, disfigure or intentionally destroy by any means any tree in public places, except with permits described elsewhere in this chapter;
 4. Construct a concrete, asphalt, brick or gravel sidewalk, or otherwise fill up the ground area near any tree in public places, to shut off air, light or water from the roots, except under written authority from the Director;
 5. Place building material, equipment or other harmful substance near any tree in public places which might cause injury to the tree;
 6. Post any sign on any tree in public places, tree-stake or guard, or fasten any guy wire, cable or rope to any tree, tree-stake or guard; provided, however, that tree-stakes or guards may be placed around trees growing in the public rights-of-way by property owners for the purpose of protecting or training the trees, with approval of the parks and landscape maintenance supervisor; or
 7. Plant any tree in public places, except according to policies, regulations and specifications established pursuant to this chapter or any currently applicable ordinances or code sections.
- B. Any person deemed responsible for damaging a tree in a public place or removing a tree without a permit as described in this chapter is liable for damages to the City in an amount equal to the value of the tree plus City costs incurred to assess damages, in addition to or as part of any other enforcement action.
- C. The trimming, pruning or removal of protected trees is subject to the provisions of this chapter. (Ord. 561 § 3, 2019)

8.06.080 Responsibilities of property owners.

- A. Pursuant to Streets and Highways Code Section 5610, it is the duty and responsibility of all property owners to maintain the grounds of sidewalks, parkways, and maintenance strips on the owner's property, regardless of whether such property is developed or within the public right-of-way. Property owners are responsible for watering trees growing in public rights-of-way. The owner of any property has the primary and exclusive duty to perform maintenance of any sidewalk, parkway, or maintenance strip on the owner's property, regardless of whether the City has notified the owner of the need for such maintenance or has performed similar maintenance in the past. The property owner shall owe a duty to members of the public to keep and maintain the sidewalk area in a safe and nondangerous condition. If, as a result of the failure of any property owner to maintain the sidewalk area in a nondangerous condition as required by this section, any person suffers injury or damage to person or property, the property owner is liable to such person for the resulting damages or injury. Notwithstanding the foregoing, if a property owner believes damage to the sidewalk, parkway, or maintenance strip has been caused by a tree planted by the City, the owner must notify the Director in writing.
- B. It is the duty and responsibility of every person owning or occupying any real property within the City of Santee, to keep all trees on that property trimmed in such a manner that meets City of Santee clearance standards for any street, alley, and sidewalk. It is also the duty and responsibility of every person owning or occupying any real property within the City of Santee to keep all trees and shrubs on that property trimmed in such a manner that they do not obstruct the view of any traffic sign or device for vehicle traffic in the direction controlled by that traffic sign or device.
- C. Property owners having trees or shrubs growing on public rights-of-way must maintain these trees and shrubs to a reasonable standard of care. Reasonable care ensures that trees and shrubs growing on public rights-of-way do not block pedestrian visibility; do not obstruct street clearance requirements; do not obstruct sidewalk clearance requirements; do not obstruct traffic signals or signs; do not grow into overhead utility lines; and do not allow tree root structures to undermine sidewalks, curbs, gutters, ad-

adjacent roadways, and underground utilities such as water and sewer lines. Street and sidewalk clearance is defined as a minimum of 13 feet, six inches from the lowest branches to the street or sidewalk. (Ord. 561 § 3, 2019)

8.06.090 Responsibilities for removing trees for newly aligned curbs, gutters, sidewalks and water/sewer laterals.

When designing or approving new alignments for sidewalks, curbs or driveway approaches, the City may take into account alternative options to preserve desirable trees growing on public rights-of-way. When trees growing on public rights-of-way must be removed, it is the responsibility of adjacent property owners to remove, at their own expense, any private trees directly in the way of new sidewalks, curbs and driveway approaches, unless the tree had been planted with City approval. (Ord. 561 § 3, 2019)

8.06.100 Tree maintenance by public utilities.

- A. A public utility must obtain a permit pursuant to Section 8.06.110, issued by the Director to maintain trees growing adjacent to utility fixtures or apparatus. The requirement to obtain a permit includes trees that encroach upon public streets.
- B. When maintaining trees for which a maintenance permit has been obtained, a public utility must observe good arboricultural practices, as specified by International Society of Arboriculture western chapter pruning standards and City of Santee pruning standards. (Ord. 561 § 3, 2019)

8.06.110 Trimming, pruning or removal—Permit required.

No person is permitted to trim, prune, cut, break, deface, destroy, burn or remove any tree, hedge or shrub from any City-owned public property or from a public highway within the City unless authorized in writing to do so by the Director or the City Council. (Ord. 561 § 3, 2019)

8.06.120 Trimming, pruning or removal—Permit application.

- A. Any person desiring to trim, prune or remove any tree, hedge or shrub from any public property or public highway must file an application with the Director and obtain a permit issued in accordance with Section 8.06.130.
- B. In nonemergency circumstances which do not pose an immediate threat to the public health, welfare or safety, any person desiring to trim, prune or remove a protected coast live oak tree must file an application with the Director. The Director may consider the following with respect to the permit application:
 - 1. The condition of the tree with respect to disease, danger of falling, proximity to existing or proposed structures and interference with utility services;
 - 2. The necessity to remove the tree in order to construct improvements to the property;
 - 3. The topography of the land and the effect of the removal of the tree on erosion, soil retention, and diversion or increased flow of surface waters;
 - 4. The long-term value of the species under consideration, particularly lifespan and growth rate;
 - 5. The ecological value of the tree such as for food, nesting, habitat, protection and shade for wild-life or other plant species;
 - 6. The number, size, species, age distribution and location of existing trees in the area and the effect the removal would have upon shade, privacy impact, and scenic beauty;
 - 7. The number of trees the particular parcel can adequately support according to good arboricultural practices;

- 8. The availability of reasonable and feasible alternatives that would allow for the continued protection of the tree.
- C. A protected tree must not be removed unless and until the City Council authorizes such removal.
- D. In such instances when a protected tree poses danger to the public health, welfare or safety, and requires immediate pruning, trimming or removal without delay, a verbal authorization to prune, trim or remove the tree may be given by the Director. Any person removing a protected tree pursuant to this subsection must replace such tree within 30 days after removal by planting another tree of a type and in such location specified by the Director. The requirement of replanting another tree may be waived by the Director for reasons such as spacing, location and good arboricultural practices for that species of tree. If removal of a tree pursuant to the authority of this subsection results in the elimination of the need for protection under this chapter, whether or not due to the waiver by the Director of the replacement requirement, the City Council will amend this chapter to remove the protected status within 60 days thereafter. (Ord. 561 § 3, 2019)

8.06.130 Trimming, pruning or removal—Permit issuance or denial.

- A. The Director may issue a written permit authorizing the trimming, pruning or removal of any tree, hedge or shrub within a public highway upon such terms and conditions as the Director deems appropriate to provide protection to persons and property or may deny such permit.
- B. Any person removing a live tree pursuant to a permit issued by the Director must, within 30 days following removal of such live tree, plant another tree of a type and in a location specified in the permit. The requirement of replanting another tree may be waived by the Director for reasons such as spacing, location and good arboricultural practices for that species of tree.
- C. The Director may issue a written permit authorizing the trimming, pruning or removal of a protected tree upon such terms and conditions as the Director deems appropriate to provide protection to persons and property or may deny such permit. (Ord. 561 § 3, 2019)

8.06.140 Trimming, pruning or removal by City.

If the Director deems that the trimming, pruning or removal of any tree, hedge or shrub within a public highway is necessary for the protection of the traveling public or public property, the Director may, subject to the availability of funds, personnel and equipment, cause such tree to be trimmed, pruned or removed to provide such protection. A protected tree must not be removed unless and until the City Council authorizes such removal. Notwithstanding the foregoing sentence, in such instances when a protected tree within a public highway poses danger to the public health, safety, and welfare and requires immediate removal without delay, and such removal results in the elimination of the need for protection, the City Council will amend this chapter to remove the tree from protected status within 60 days thereafter. (Ord. 561 § 3, 2019)

8.06.150 Planting—Permit required.

No person is permitted to plant any tree, hedge or shrub upon or within any City, public highway, or public property within the City unless authorized in writing to do so by the Director. (Ord. 561 § 3, 2019)

8.06.160 Planting—Permit application.

Any person desiring to plant any tree, hedge or shrub within any public highway or public right-of-way must file an application with the Director and receive a permit pursuant to Section 8.06.170. (Ord. 561 § 3, 2019)

8.06.170 Planting—Permit issuance or denial.

No permit for the planting of a tree within any public highway will be issued by the Director unless the species of the tree to be planted is one approved by the Director. The permit for the planting of a tree, shrub or hedge may be issued upon such terms and conditions as the Director determines appropriate to protect persons and property or may be denied. (Ord. 561 § 3, 2019)

8.06.180 Removal of protective structures.

No person is permitted to injure, deface, or remove any protective structure placed around any tree or plant growing upon any public highway or public property in the City or around protected trees on the County Edgemoor property. (Ord. 561 § 3, 2019)

8.06.190 Exemption from Solar Shade Control Act.

The City is exempt from the provisions of Chapter 12 (commencing with Public Resources Code Section 25980), Division 15 of the Public Resources Code, known as the Solar Shade Control Act. (Ord. 561 § 3, 2019)

8.06.200 Tree service contractors.

When the City requires tree pruning, any tree service contractor performing work must have on staff an arborist certified by the western chapter of the International Society of Arboriculture. This arborist must use reasonable diligence in overseeing pruning trees and must certify that all work meets the City's pruning specifications. (Ord. 561 § 3, 2019)

8.06.210 Emergency tree services.

The City will attempt to provide on-call tree services in emergencies. Emergencies include fallen trees and other immediate safety hazards. The parks and landscape maintenance supervisor determines if an emergency exists. These services will be provided on an "as available" basis and the City assumes no liability for failing to provide these emergency services. (Ord. 561 § 3, 2019)

8.06.220 Topping prohibited.

The topping of public trees and protected trees is prohibited, unless the failure to top a tree poses a threat to public safety. (Ord. 561 § 3, 2019)

8.06.230 Local government disclaims liability.

Nothing contained in this section imposes any liability upon the City, its officers or employees, or relieves the owner of any property from the duty to keep any tree, shrub or plant upon any street tree area on his or her property or under his or her control in such condition as to prevent it from constituting a hazard or an impediment to travel or vision upon any street, park, pleasure ground, boulevard, alley or public place within the City. (Ord. 561 § 3, 2019)

8.06.240 Interference with planting, maintenance, and removal unlawful.

No person, firm or corporation is permitted to interfere with the Parks and Landscape Maintenance Supervisor or persons acting under his or her authority while engaged in trimming, planting, mulching, pruning or removing any tree, shrub or plant in any right-of-way or public place within the City. (Ord. 561 § 3, 2019)

8.06.250 Appeals.

Any action by the Parks and Landscape Maintenance Supervisor may be appealed, unless otherwise stated, to the Director within 30 working days after the decision of the Parks and Landscape Maintenance Supervisor. The appeal must be in writing and filed with the Community Services Department. Any appeal pursuant to this chapter will be governed by the procedures in Chapter 1.14; provided, however, that the Director's decision is final and nonappealable. The decision by the Parks and Landscape Maintenance Supervisor to remove a tree for safety reasons or in an emergency will be accomplished immediately and is not appealable. (Ord. 561 § 3, 2019)

8.06.260 Enforcement.

The Parks and Landscape Maintenance Supervisor is hereby charged with the responsibility for the enforcement of this chapter in accordance with the provisions of Title 1. (Ord. 561 § 3, 2019)

Resources and Guides for Homeowners and Businesses

The tree care industry has developed free resources for homeowners and business to aid in managing trees on their property. When choosing a tree to install in a landscape property owners should consider the concept of “right tree, right place.” This refers to carefully selecting the appropriate size and shape tree for the given area, as well as any possible nuisance, allergy, or negative infrastructure conflicts in the future. Several resources are provided below for City staff to be able to provide concerned citizens with industry approved material at no cost.



Tree Selection and Placement

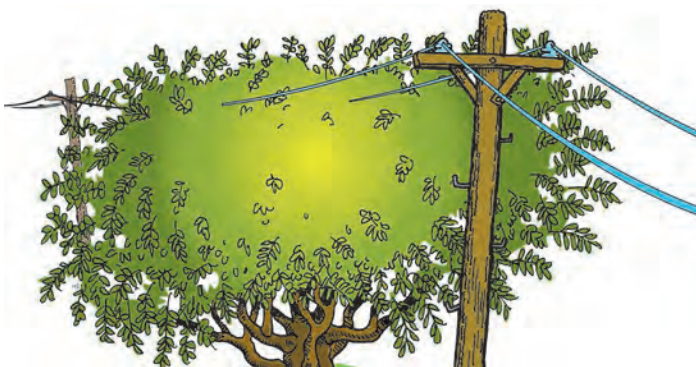
Understand the various factors to consider when selecting trees.



Tree selection and placement are important decisions a homeowner makes when landscaping or replacing a tree. Matching the tree to the site benefits both the tree and the homeowner.

Before asking, "What kind of tree should I plant?" consider the following:

- Why is it being planted and what function will it serve?
- What are the soil conditions?
- How will necessary maintenance be provided?
- What size tree is best suited for the location? How large will the tree be when full grown? Do overhead or below ground utilities prevent planting a tree? What clearance is needed for sidewalks, patios, or driveways?



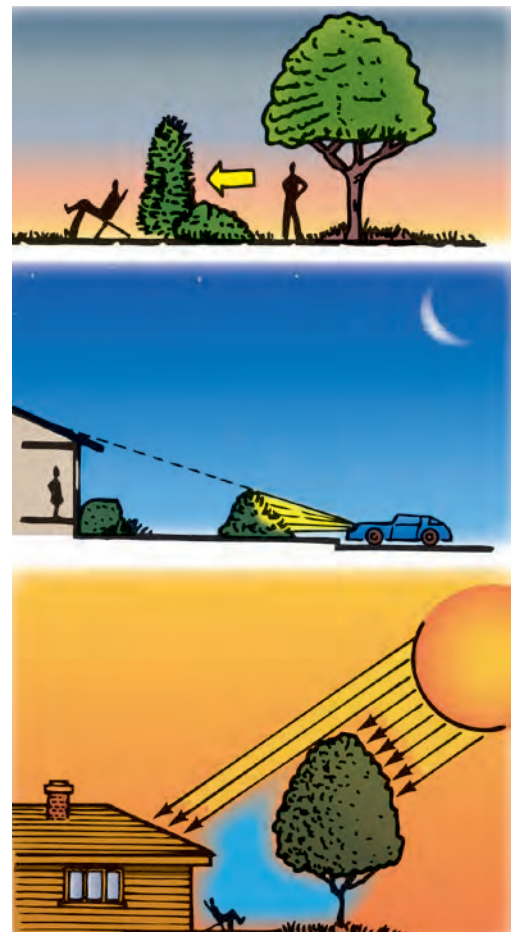
Form and Size

Selecting the right form (shape) to complement the desired function can reduce maintenance costs and increase the tree's value.

- Mature tree size determines the level of benefits received.
- Larger trees typically provide the greatest economic and environmental returns.
- Depending on the site restrictions, you can choose from hundreds of form and size combinations.
- Low spreading trees may be planted under overhead utility lines, while a tall evergreen may provide a screen.

Tree Functions

- Healthy trees increase property values.
- Deciduous shade trees cool homes in the summer and allow the winter sun to heat homes when they lose their leaves.
- Evergreens can provide a windbreak or a screen for privacy.
- Fruit trees or shrubs can provide food for owners or wildlife.
- Street trees reduce the glare from pavement, reduce runoff, filter pollutants, add oxygen, and improve overall appearance and quality of life.
- Trees also provide environmental benefits such reducing the amount of carbon dioxide in the atmosphere.



Site Conditions

Choosing a tree for the right site conditions is the key to tree survival and reduced maintenance. Consider the following:

Soil conditions

- The soil in dense urban areas and new subdivisions is often disturbed, shallow, compacted, and subject to drought. An arborist can take soil samples from your yard for testing to determine which trees are suited for your property and may provide recommendations to improve the soil condition.

Exposure (sun and wind)

- The amount of available sunlight will affect tree and shrub selection. Wind exposure is also a consideration.

Space constraints

- Available planting space can be limited by many factors, such as overhead or underground utilities, pavement, buildings, visibility, or other trees. Ensure there's adequate room to let trees grow above and below ground.

Hardiness zone

- Hardiness is the tree's ability to survive extreme temperatures of a specific region. Research plants for their hardiness information in your region.

Human activity

- The top five causes of tree death result from things people do. Soil compaction, under-watering, overwatering, vandalism, and the number-one cause — planting the wrong tree — account for more tree deaths than all insect- and disease-related tree deaths combined.

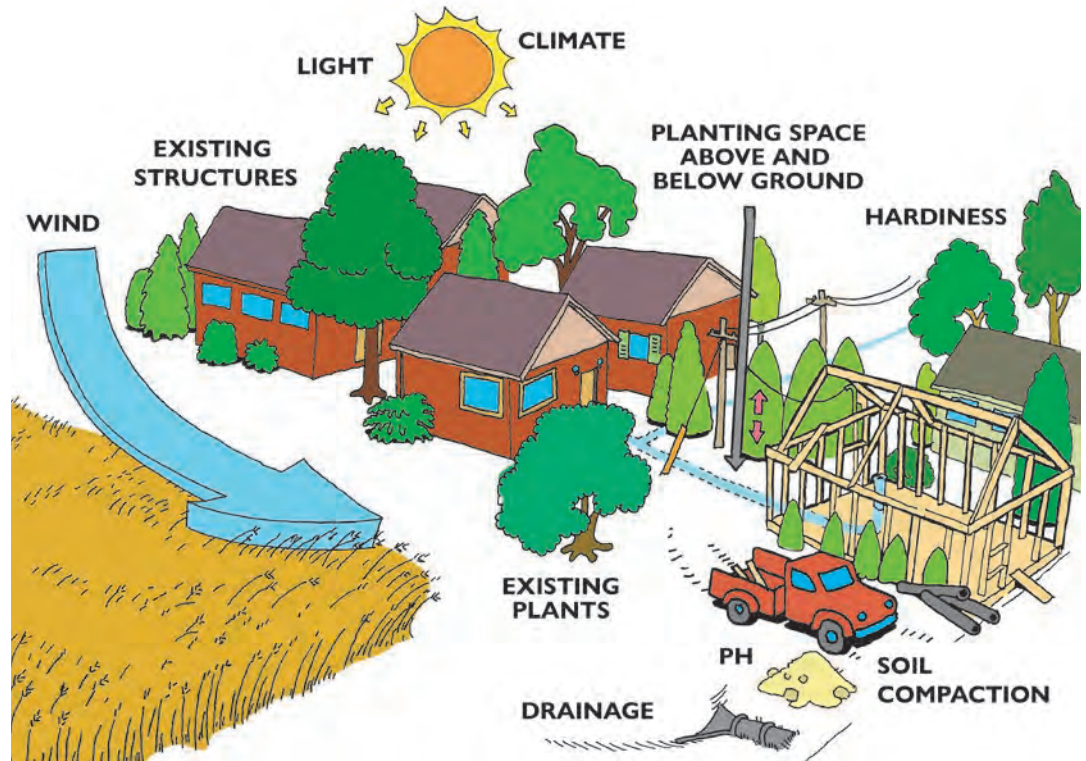
Drainage

- Roots require oxygen to develop; poor drainage limits oxygen availability and may kill the tree.

Insect and disease susceptibility

- Every plant has its particular pest and disease problems and the severity varies geographically.

Personal preferences and site constraints also play major roles in the selection process.



What Is a Certified Arborist?

ISA Certified Arborists® are individuals who have proven a level of knowledge in the art and science of tree care through experience and by passing a comprehensive examination developed by some of the nation's leading experts on tree care. ISA Certified Arborists must also continue their education to maintain their certification. Therefore, they are more likely to be up to date on the latest techniques in arboriculture.

Finding an Arborist

Visit TreesAreGood.org for free tools and to read and download all brochures in this series.

- The "Find an Arborist" tool can help you locate an arborist in your area.
- The "Verify a Credential" tool enables you to confirm whether an arborist has an ISA credential.



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Through research, technology, and education, the International Society of Arboriculture promotes the professional practice of arboriculture and fosters a greater worldwide awareness of the benefits of trees.

Caring for Private Trees

Privately owned and maintained trees are just as important to the community's urban forest as the publicly managed trees and are typically in greater quantity. This is especially important due to the existing protected, native trees in the city and the City ordinance subsection 8.06.120 B. which states that any person desiring to trim, prune, or remove a protected tree must file a permit application with the Director. Therefore, providing a resource on mature tree care to the public is critical to ensuring that private, protected, and native trees are maintained well. The public should be informed of the benefits of hiring professional arborists certified by the International Society of Arboriculture.



Buying High-Quality Trees



Discover guidelines for determining tree quality at time of purchase and for identifying problems with tree structure, roots, and injuries.

Trees serve many purposes in your local community and throughout the entire world. A high-quality tree, when planted and cared for, can become a long-lasting asset to your property. A low-quality tree may develop costly problems over time, increasing the need for maintenance and reducing the benefits a tree can provide.

What Determines Tree Quality?

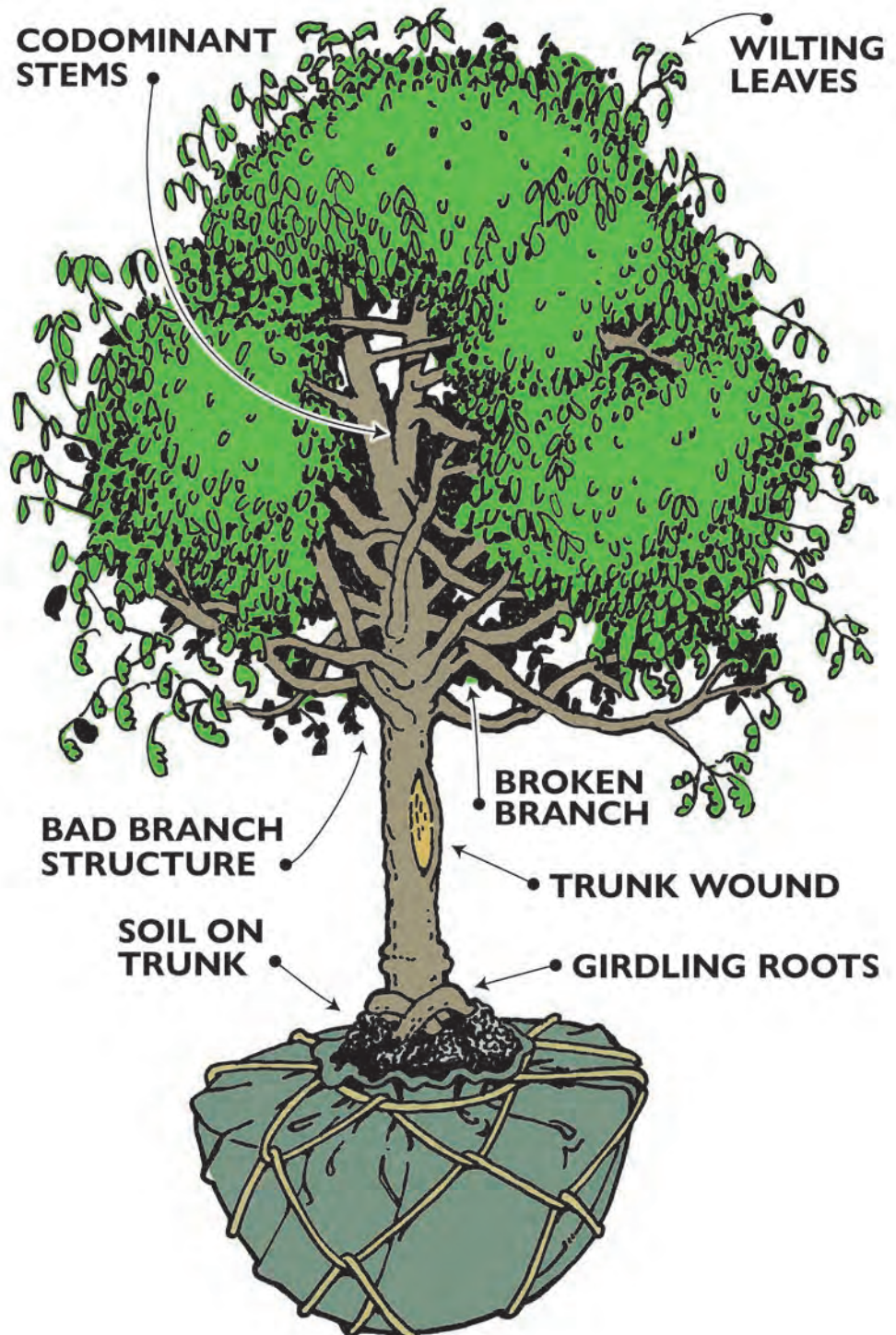
A high-quality tree has:

- A straight trunk with well-spaced branches.
- An exposed trunk free of wounds or damage.
- Roots growing straight out from the trunk.

A low-quality tree has:

- Weak form in which multiple stems originate from the same point and branches grow into each other.
- A trunk with wounds from handling or incorrect pruning.
- Limited, crushed, or circling roots in an undersized ball or container.

These problems can greatly reduce the tree's prospects for a healthy and productive life. When buying a tree, inspect it carefully to identify problems related to form, injuries, or roots.



Root Problems

Nursery trees are often classified based on how they are produced, harvested, and sold. Each type of tree has a unique root system:

- Bare root: no soil surrounding roots; usually small trees.
- Balled and burlapped: roots of field-grown trees surrounded by soil and held with burlap and wire or rope.
- Container: roots and soil in a container.

Bare Root Stock

Bare roots should not be crushed, torn, desiccated, or discolored. The ends of the roots should be cleanly cut. Damaged roots may be cut cleanly prior to planting and watering. The benefits of bare roots are that they tend to grow straight roots after planting and are easy to transport and plant. They have limitations; however, bare roots need to be planted soon after digging to prevent root drying and may not be suitable for all species.

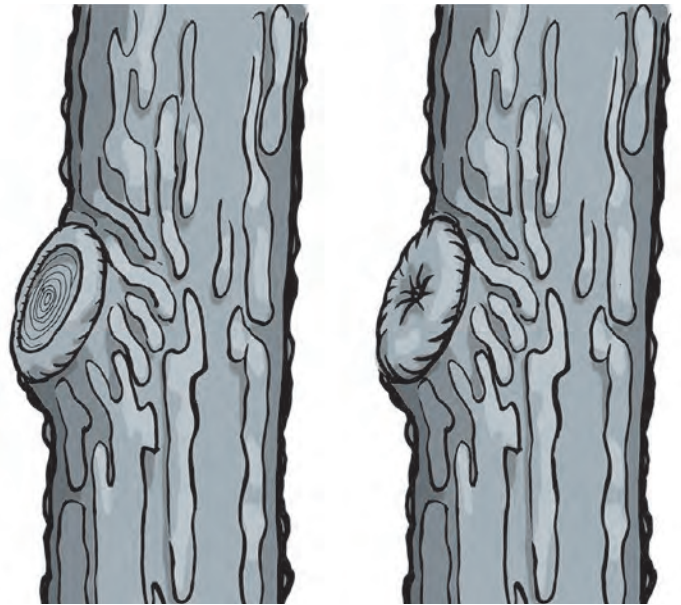
Balled-and-Burlapped Stock

You should be able to see the trunk flare (the area where the trunk widens and connects with the roots) at the top of the root ball. Avoid buying plants with badly damaged or compressed root balls. The top of the root ball should be flat. Rounding may be an indication of woody root loss.

The diameter of the root ball should be at least 10–12 times the diameter of the trunk as measured 6 inches (15 cm) above the trunk flare.

Container Stock

- Roots should not twist or circle in the container.
- Remove the root ball from the container for inspection.
- Pay special attention to larger, exposed roots.
- Circling roots may girdle (*see figure on right*) and kill other roots or the entire tree if wrapped around the trunk.
- Fine circling roots may be cut away at planting.
- Larger roots may be straightened if still flexible.
- You should be able to see the basal trunk flare with container-grown plants. If the trunk flare has been buried, gently expose it before planting the tree, taking care not to damage the bark.



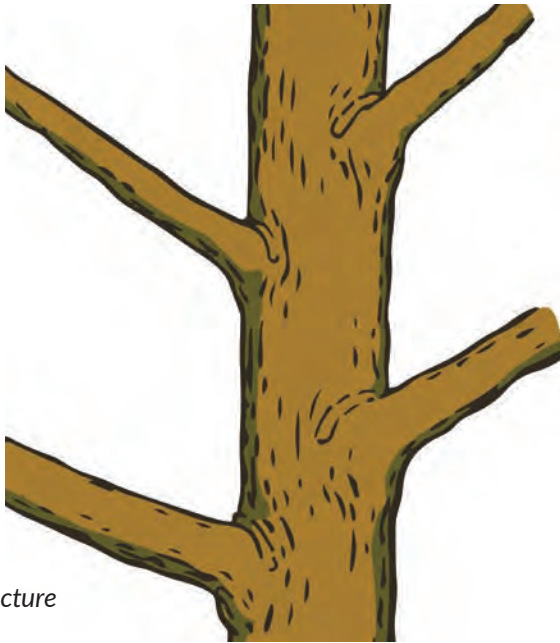
Injuries

Never buy a tree without thoroughly checking the trunk. If the tree is wrapped, remove the wrap and inspect the trunk for wounds, incorrect pruning cuts, and insect injuries. Wrap can be used to protect the trunk during transit, but should be removed after planting.

A correct pruning cut removes the branch just outside of the collar. A ring, or “doughnut,” of sound tissues then grows around the cut (*see figure above*). **Do not make cuts flush to the trunk.** Trunk tissues above and below a flush-cut branch often die, creating dead spots. When high summer or low winter temperatures occur, cracks or long, dead streaks may develop above and below the dead spots.

(Figure below) Girdling root as tree matures.





Good structure



Poor structure

Form

- When buying a young shade tree it is important to note that the branches you see may not be present at maturity. Many lower branches will be shaded out as the tree grows, or pruned away to allow clearance for pedestrians, traffic, mowing, or other activities.
- Many nurseries prune young trees to spur crown growth. This may lead to issues that must be addressed later with corrective pruning.
- Good strong form—branch architecture—starts with branches evenly spaced along the trunk. Branches should have firm, sturdy attachments to the trunk.
- Branches with narrow angles of attachment may cause problems later.
- When several branches are growing at the same position on the trunk, the likelihood of weak attachments, compression, and cracks increases greatly.
- Branches that press against the trunk or each other signal problems. These areas of contact may become compressed, crack, or die back.
- If you desire a tree with multiple trunks, make certain that the trunks are well separated at the ground line. Remember, trunks expand in diameter as they grow. Two trunks may be slightly separated when small, but as they grow the trunks will squeeze together.
- When planting remove only broken or torn branches to allow the tree to recover from the stress of transplanting.
- Many architectural issues can be addressed through corrective pruning or training. Begin corrective pruning one year after planting and space over several years.

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Why Hire an Arborist?

Learn about services that arborists provide, criteria for selecting an arborist, and the benefits of hiring an ISA Certified Arborist®.



Healthy trees serve many purposes in your local community. A way to ensure your trees stay healthy is by hiring an arborist. Professional, trained arborists know how to properly maintain trees for the safety of the public and the health of the tree.

What Is an ISA Certified Arborist?

An ISA arborist certification is a nongovernmental, voluntary process by which individuals can document their base of knowledge. Certification provides a measurable assessment of an individual's knowledge in the competencies needed for proper tree care.

When a professional becomes an ISA Certified Arborist, they should be recognized by their peers and the public as a tree care professional who has attained a generally-accepted level of knowledge in areas such as tree biology, diagnosis, maintenance practices, safety, and other subject and practice areas within the tree care profession as identified through periodic job task analyses.

They must also continue their education to maintain their certification. Therefore, they are more likely to be up to date on the latest techniques in arboriculture.



Selecting the Right Arborist for the Job

- Check for an ISA arborist credential. ISA Certified Arborists and ISA Board Certified Master Arborists® are experienced professionals who have passed comprehensive exams covering all aspects of tree care.
- Check for membership in professional organizations such as the International Society of Arboriculture (ISA), the Tree Care Industry Association (TCIA), or the American Society of Consulting Arborists (ASCA).
- Ask for proof of insurance and call the insurance company.
- Check for local permits and licenses.
- Get more than one estimate and ask for references.
- Don't always accept the lowest bid. Examine the credentials and the written specifications of the firms that submitted the bids and determine the best combination of price, work to be done, skills and professionalism.
- Be wary of people who go door to door and offer bargains.
- ISA certification holders must follow a Code of Ethics and use industry-accepted practices and standards.
- Get it in writing. Most reputable arborists have their clients sign a contract. Read it carefully and ask questions.

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- ISA credential holders have access to a digital certificate of their credentials to shared online.

Be an Informed Consumer

One of the best methods to use in choosing an arborist is to learn some of the basic principles of tree care. Visit [TreesAreGood.org](https://www.treesaregood.org) to read and download all brochures in this series.

Your local garden center, extension agent, or city arborists are also excellent sources of information if you should have further questions. They may also be able to refer you to an ISA Certified Arborist or ISA Board Certified Master Arborist in your area.

Services That Arborists Provide:

Pruning

Arborists can determine the type of pruning necessary to improve the health, appearance, and safety of trees. Pruning may include removing limbs that:

- Interfere with utilities or structures.
- Obstruct streets or sidewalks.
- Are dead, damaged by storms, weak, or decayed, and pose unacceptable risk.
- Are diseased or insect-infested.

Other pruning strategies improve tree structure, and reduce the likelihood of future damage during storm events.



Planting

Some arborists plant trees, and most recommend species that are appropriate for certain locations. Selecting the wrong tree can lead to future problems with growing space, insects, diseases, or poor growth.

Emergency Tree Care

Removing or pruning storm-damaged trees can be dangerous, but an arborist can perform the job safely while reducing further risk of damage to people and property.

Tree Removal

Arborists can help decide if a tree should be removed. Hiring an arborist is recommended when the tree is:

- Dead, dying, or considered an unacceptable risk.
- Causing an obstruction that is impossible to correct through pruning.
- Crowding and causing harm to other more desirable trees.
- Located in where new construction requires removal.

Other Services

Arborists may also provide other services, including:

- Plant health care or preventive maintenance.
- Cabling and bracing for added support to branches with weak attachments.
- Soil aeration to improve root growth.
- Installation of lightning protection systems.
- Consulting and legal services relating to trees.
- Tree risk assessment.
- Tree protection during construction.



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Mature Tree Care

Learn procedures specific to a routine maintenance program for mature tree care, including tree inspection, mulching, fertilization, pruning, and tree removal.



Trees serve many purposes in your local community; therefore, homeowners should think of tree care as an investment. A healthy tree increases in value with age and pays big dividends by increasing property values, beautifying surroundings, purifying air, and saving energy by providing cooling shade from summer's heat and protection from winter's wind.

Trees in the city or near houses need regular maintenance to promote health and structural integrity. An effective maintenance program, including regular inspections and necessary follow-up care—mulching, fertilizing, and additional soil management—can identify problems and correct them before they become damaging or fatal.

Tree Inspection

Regular tree inspections can detect changes in a tree's health before a disease, insect, or environmental problem becomes too serious. Mature trees should be inspected at least once a year to assess four characteristics of tree vitality: new leaf or bud formation, leaf size, twig growth, and absence of crown dieback (gradual death of the upper part of the tree).

Growth reduction is a fairly reliable cue that the tree's health has recently changed. An experienced arborist can look at twig growth from past years to determine whether there is a reduction in the tree's typical growth pattern.

In addition to tree health, tree stability is a major concern. There are some tree characteristics you can look for that can indicate structural weakness. These include cavity opening, extensive twig dieback, and the presence of fungal conks (mushrooms or brackets on the trunk).

Any abnormalities found during these inspections should be noted and monitored closely. Report your findings to your local tree care professional for advice on treatment options.

Pruning

- Pruning is often desirable or necessary to remove dead, diseased, or insect-infested branches and to improve tree structure, enhance vitality, or reduce risk.
- The removal of live branches creates a lasting wound; therefore, no branch should be removed without a reason.
- Pruning large trees requires special equipment, training, and experience.
- If pruning requires climbing, the use of a chain or hand saw, or the removal of large limbs, personal safety equipment is a must.

ISA Certified Arborists® can assist in performing the job safely and reducing the risk of personal injury and damage to your property. They can also determine which type of pruning is necessary to maintain or improve the health, appearance, and safety of your trees.



Soil Management

- Soil tests are generally required before fertilizing or adjusting pH.
- Urban landscape trees often exist in soils that lack the nutrients, pH (acidity or alkalinity), drainage, or pore space (air and water space) needed for growth and development.
- Fertilization based on plant needs can correct many deficiencies that limit growth. Sometimes soil nutrients may be sufficient, but soil pH levels may prevent plant uptake. In this case, soil amendments, such as sulfur, lime, and even some mulches, can alter soil chemistry and help alleviate plant stress.
- Drainage systems or grading can help correct saturated soil conditions.
- Trenching or earthmoving within the tree's root zone may cause more harm than good.
- Compacted soils can be tilled mechanically or with compressed air to increase porosity and encourage root growth.
- When dealing with a mature tree, have the soil tested for nutrient content and texture. An arborist can arrange to have your soil tested at a soil testing laboratory and recommend treatments based on the results.

Mulching

- Mulching can reduce environmental stress by providing trees with a root environment that has fewer temperature and moisture extremes than the surrounding soil.
- Mulch reduces competition from weeds and grass and prevents mechanical damage by keeping lawn care equipment away from the tree's base.
- Mulches made from plant matter will add nutrients to the soil as they decompose and help improve soil biology.
- Mulch should be placed 2-4 inches (5-10 cm) deep. It should be placed near, but not touching, the trunk and extend to the dripline (furthest extent of the branches).



If you can't mulch the full distance, go as far from the trunk as possible while maintaining the landscape character.

Removal

Although tree removal is a last resort, there are circumstances when it is necessary. An ISA Certified Arborist can help decide whether or not a tree should be removed and they possess the skills and equipment to safely and efficiently remove trees. Removal is recommended when a tree:

- Is dead, dying, or considered irreparably hazardous.
- Is causing an obstruction or is crowding and causing harm to other trees and the situation is impossible to correct through pruning.

With maintenance, trees can add aesthetic and economic value to your property. Poorly maintained trees can be a significant liability.

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Why Topping Hurts Trees

Learn why topping is not an acceptable pruning technique and discover recommended alternatives.



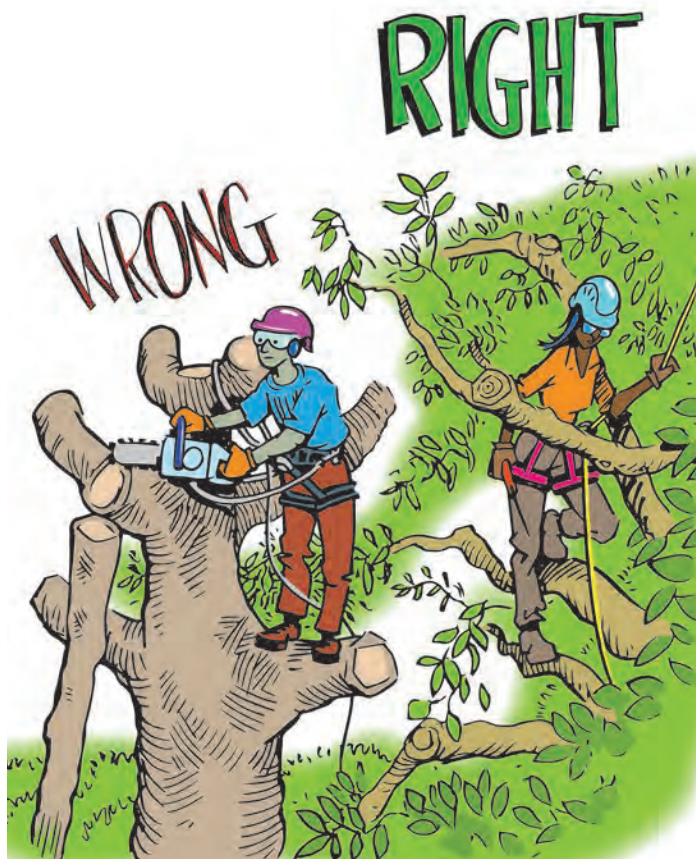
Topping is perhaps the most harmful tree pruning practice known. Yet, despite more than 25 years of literature and seminars explaining its harmful effects, topping remains a common practice.

What Is Topping?

Topping is the indiscriminate cutting of tree branches to stubs or to lateral branches that are not large enough to assume the terminal role.

Other names include “heading,” “tipping,” “hat-racking,” and “rounding over.”

Topping is often used to reduce the size of a tree. Homeowners may feel a large tree poses a risk to their property; however, topping is not a viable method of height reduction, and may increase risk in the long term.



Topping Stresses Trees

Leaves are the food factories of a tree; however, topping can remove 50-100% of a tree's leaf-bearing crown. Removing the leaves can potentially starve a tree and trigger various survival mechanisms. Dormant buds are activated, forcing rapid growth of multiple shoots below each cut. The tree needs to grow a new crop of leaves as soon as possible. If a tree does not have the stored energy reserves to do so, it will be seriously weakened and may die.

A stressed tree with large, open pruning wounds is more vulnerable to insect and disease infestations. The tree may lack sufficient energy to chemically defend the wounds against invasion, and some insects are actually attracted to the chemical signals trees release.

Topping Can Lead to Sunburn

Branches within a tree's crown produce thousands of leaves to absorb sunlight. When the leaves are removed, the remaining branches and trunk are suddenly exposed to high levels of light and heat. The result may be sunburn of the tissues beneath the bark, which can lead to cankers, bark splitting, and death of some branches.



Topping Leads to Decay

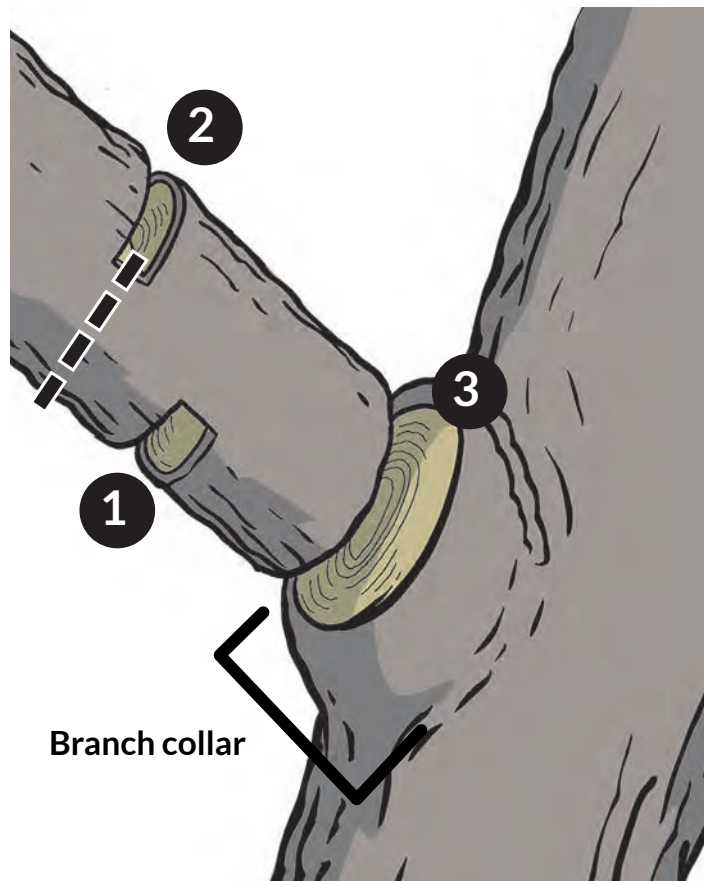
Correct pruning cuts are made just beyond the branch collar (see figure below). The tree is biologically equipped to close such a wound if the tree is healthy enough and the wound is not too large.

Cuts made indiscriminately between lateral branches create stubs or wounds that the tree may not be able to close. The exposed wood tissues begin to decay. Normally, a tree will “wall off,” or compartmentalize, the decaying tissues, but few trees can defend the multiple severe wounds caused by topping. The decay organisms are given a free path to move through branches.

Topping Can Lead to Unacceptable Risk

The survival mechanism that causes a tree to produce multiple shoots below each topping cut comes at great expense to the tree (see figure above). These shoots develop from buds near the surface of the old branches. Unlike normal branches that develop in a socket of overlapping wood tissues, these new shoots are anchored only in the outermost layers of the parent branches and are weakly attached.

The new shoots grow quickly, as much as 20 feet (6 m) in one year in some species. Unfortunately, the shoots are weakly attached and prone to breaking, especially during windy or icy conditions. While the original goal was to reduce risk by reducing height, risk of limb failure has now increased (see figure below).



Topping Makes Trees Ugly

Topping destroys the natural form of a tree. Trees form a variety of shapes and growth habits, all with the same goal of presenting their leaves to the sun. Topping removes the ends of the branches, often leaving ugly stubs. Without leaves (for up to six months of the year in temperate climates), a topped tree appears disfigured and mutilated. **A tree that has been topped can never fully regain its natural form.**

How to Make a Pruning Cut:

1. Make an undercut about 12–18 inches (30–46 cm) from the limb's point of attachment.
2. Make a second cut from the top, directly above or a few inches farther out on the limb. Doing so removes the limb, leaving a stub.
3. Remove the stub by cutting back to the branch collar, but do not cut the collar. This technique reduces the possibility of tearing the bark.

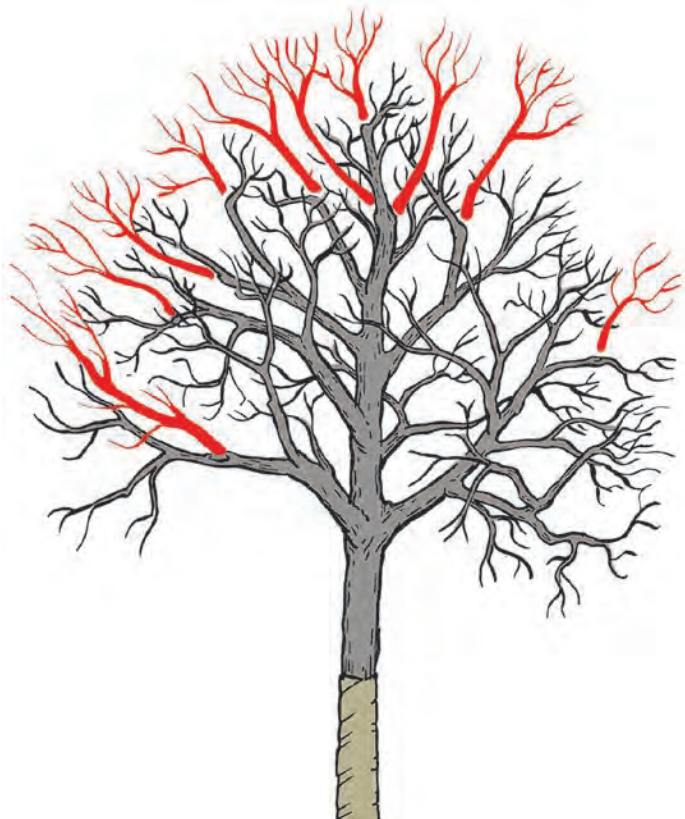
If the tree has started closing over a stub, cut just the dead stub and not the live tissue.



Topping Is Expensive

The cost of topping a tree is not limited to only the job cost. Some hidden costs include:

- Increased maintenance costs. If the tree survives, it will likely require corrective pruning within a few years (e.g., crown reduction or storm damage repair). If the tree dies, it will have to be removed.
- Reduced property value. Healthy, well-maintained trees can add 10–20% to the value of a property. Disfigured, topped trees are considered an impending expense.
- Increased liability potential. Topped trees may pose an unacceptable level of risk. Because topping is considered an unacceptable pruning practice, any damage caused by branch failure of a topped tree may lead to a finding of negligence in a court of law.



Proper branch reduction preserves natural form.

Alternatives to Topping

Sometimes a tree must be reduced in height or spread, such as for providing utility line clearance. There are recommended techniques for doing so. Small branches should be removed back to their point of origin. If a larger limb must be shortened, it should be pruned back to a lateral branch that is large enough (at least one-third the diameter of the limb being removed) to assume the terminal role. This method of branch reduction helps to preserve the natural form of the tree.

Sometimes the best solution is to remove the tree and replace it with a species that is more appropriate.

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ORDINANCE NO. _____

AN ORDINANCE OF THE CITY OF SANTEE, CALIFORNIA ESTABLISHING AN AUTOMATIC ONE-YEAR EXTENSION FOR ACTIVE DEVELOPMENT APPROVALS, DUE TO THE ECONOMIC IMPACTS OF THE NOVEL CORONAVIRUS (COVID-19)

WHEREAS, on March 4, 2020, the Governor of the State of California proclaimed a state of an emergency to exist in California due to spread of the novel coronavirus (“COVID-19”); and

WHEREAS, on March 11, 2020, the World Health Organization (WHO) publicly characterized COVID-19 as a pandemic; and

WHEREAS, on March 13, 2020, the President of the United States declared a national emergency due to the continued spread and the effects of COVID-19 and announced that the federal government would make emergency funding available to assist state and local governments in preventing the spread of and addressing the effects of COVID-19; and

WHEREAS, on March 16, 2020, the Governor of the State of California issued Executive Order N-28-20, wherein he found that the economic impacts of COVID-19 have been significant, and could threaten to undermine the stability of California businesses; and

WHEREAS, on March 25, 2020, the Santee City Council adopted Emergency Resolution 023-2020, declaring the existence of a local emergency due to COVID-19; and

WHEREAS, on March 27, 2020, the San Diego County Public Health Officer issued an order limiting gatherings of a certain number, closing certain business establishments, limiting the operations of other business establishments, and requiring social distancing, increased sanitation standards, and the use of telecommuting; and

WHEREAS, on April 17, 2020, the Governor labeled California’s economic crisis a “pandemic-induced recession;” and

WHEREAS, on October 14, 2020, the City Council adopted Urgency Ordinance No. 583, approving an automatic one-year extension for all development approvals then in effect; and

WHEREAS, on June 11, 2021, the San Diego County Public Health Officer issued a new order, ending certain restrictions on business operations, but continuing requirements for the use of face coverings, restrictions on large gatherings, and recommendations regarding travel limitations; and

WHEREAS, as of the date of this Ordinance, employee shortages and materials shortages, in addition to public health orders to limit public gatherings and socially distance, continue to have a financial impact on local businesses; and

ORDINANCE NO. _____

WHEREAS, as of the date of this Ordinance, and in order to prevent further exposure, many businesses have imposed work from home policies; meetings, events and social gatherings are being cancelled as people remain at home; customers are not patronizing restaurants and stores in the same numbers as they did before the pandemic; and

WHEREAS, many businesses have experienced or are experiencing restrictions on operations related to COVID-19, which delay their ability to proceed with approved development in the City; and

WHEREAS, California Government Code section 8634 allows the City Council, as the governing body, to make orders and regulations necessary during a local emergency to provide for the protection of life and property; and

WHEREAS, Santee Municipal Code section 13.04.090(A) provides that approvals for development review, conditional use permits, minor conditional use permits, variances and minor deviations shall lapse three years from the approval date, unless certain actions occur; and

WHEREAS, Santee Municipal Code section 13.04.090(B) provides that extensions of the approvals may be granted for up to two years and shall not exceed a total of five years from the original date of approval; and

WHEREAS, to help relieve the continued pressure on businesses resulting from the limitations on financing and construction due to the pandemic-induced recession, the City desires to automatically extend by one year all development approvals described in Santee Municipal Code section 13.04.090(A) that are in effect and not lapsed on October 13, 2021; and

WHEREAS, this automatic one-year extension is in addition to the one-year extension granted pursuant to Urgency Ordinance No. 583, and will have no effect on an applicant's eligibility for other extensions otherwise allowed under the Santee Municipal Code.

NOW, THEREFORE, the City Council of the City of Santee does ordain as follows:

SECTION 1. The recitals above are each incorporated by reference and adopted as findings by the City Council.

SECTION 2. An automatic one-year extension is granted to all City development approvals described in Santee Municipal Code section 13.04.090(A) that are in effect and have not lapsed as of October 13, 2021. This automatic one-year extension is in addition to the one-year extension granted pursuant to Ordinance No. 583, and has no effect on an applicant's eligibility for other extensions otherwise allowed under the Santee Municipal Code.

ORDINANCE NO. _____

SECTION 3. In accordance with the California Environmental Quality Act (Pub. Resources Code, § 21000 et seq.) (“CEQA”) and the State CEQA Guidelines (Cal. Code Regs., tit. 14, § 15000 et seq.), the City Council finds that adoption and implementation of this Ordinance is not subject to CEQA pursuant to Sections 15060(c)(2) (the activity will not result in a direct or reasonably foreseeable indirect physical change in the environment) and 15060(c)(3) (the activity is not a project as defined in Section 15378), because this Ordinance has no potential for resulting in physical change to the environment, directly or indirectly. This Ordinance is also statutorily exempt under Title 14 of the California Code of Regulations, section 15269(c), as a specific action necessary to prevent or mitigate an emergency.

SECTION 4. The City Clerk shall either: (a) have this Ordinance published in a newspaper of general circulation within 15 days after its adoption or (b) have a summary of this Ordinance published twice in a newspaper of general circulation, once five days before its adoption and again within 15 days after its adoption.

SECTION 5. If any provision of this Ordinance or its application to any person or circumstance is held to be invalid, such invalidity has no effect on the other provisions or applications of the ordinance that can be given effect without the invalid provision or application, and to this extent, the provisions of this resolution are severable. The City Council declares that it would have adopted this resolution irrespective of the invalidity of any portion thereof.

INTRODUCED AND FIRST READ at a Regular Meeting of the City Council of the City of Santee, California on the 13th day of October, 2021, and thereafter **ADOPTED** at a Regular Meeting of the City Council held on the 27th day of October, 2021, by the following roll call vote to wit:

AYES:

NOES:

ABSENT:

APPROVED:

JOHN W. MINTO, MAYOR

ATTEST:

ANNETTE ORTIZ, CMC, CITY CLERK

MEETING DATE October 27, 2021

ITEM TITLE RESOLUTION APPROVING AN AMENDED SALARY SCHEDULE FOR HOURLY, GENERAL AND MANAGEMENT EMPLOYEES

DIRECTOR/DEPARTMENT Erica Hardy, Director of Human Resources *EA*

SUMMARY

Recent changes in job duties and position vacancies created an opportunity to evaluate positions in the City Manager and Development Services Departments. As a result of that evaluation, it was determined that additional responsibilities supporting the City's mission and vision for the Santee community, including SanteeTV, substantially changed the duties of the Marketing Coordinator classification. In addition, the Engineering Inspector position was modified into a lead position with the addition of a new Field Inspector position in the most recent fiscal year budget. Both Marketing Coordinator and Engineering Inspector were identified as critical positions which were potentially being paid under market. Therefore, the Human Resources staff conducted a classification and compensation review of the Marketing Coordinator and Engineering Inspector positions by surveying comparable local agencies with substantially similar positions and comparing internally at the City for equity. It was determined that the Marketing Coordinator and Engineering Inspector salary ranges are currently 6% below market median. The City typically set salaries at or above market median to remain competitive in the job market and attract and retain highly qualified employees. Therefore, based on that review, staff recommends a 10% increase to the Engineering Inspector salary from Range 44 to Range 48 and a 19% increase to the Marketing Coordinator salary band to be consistent with other management positions performing similar level duties. Implementation of these increases requires adoption of a resolution amending the Salary Schedule for Hourly, General and Management Employees.

FINANCIAL STATEMENT *HS for TM*

The proposed salary changes would result in a \$15,310 cost increase for the remainder of fiscal year 2021-22 (FY 2021-22) and would have an eventual annual cost impact of \$32,990. Funding for the FY 2021-22 cost impact will be included in the FY 2021-22 mid-year budget adjustments that will be brought forward to the City Council in February 2022.

CITY ATTORNEY REVIEW N/A • Completed

RECOMMENDATION *MDB*

Adopt the attached Resolution approving an amended salary schedule.

ATTACHMENT

Resolution approving an amended salary schedule



RESOLUTION NO. _____

**RESOLUTION OF THE CITY COUNCIL OF THE CITY OF SANTEE, CALIFORNIA,
APPROVING AN AMENDED SALARY SCHEDULE FOR HOURLY, GENERAL AND
MANAGEMENT EMPLOYEES**

WHEREAS, a survey was conducted of internal and external classifications comparable to the Marketing Coordinator and Engineering Inspector positions to determine salary alignment; and

WHEREAS, it was determined that the salary ranges for the Marketing Coordinator and Engineering Inspector positions should be adjusted; and;

WHEREAS, the Hourly, General and Management salary schedule has been amended to reflect changes to the salary ranges for the Marketing Coordinator and Engineering Inspector positions and is included as Exhibit "A";

NOW, THEREFORE BE IT RESOLVED that the City Council of the City of Santee, California, does hereby find, determine and declare that the salary schedule as provided in Exhibit "A" is approved for hourly, general and management employees effective October 28, 2021;

ADOPTED by the City Council of the City of Santee, California, at a regular meeting thereof held this 27th day of October 2021, by the following roll call vote to wit:

AYES:

NOES:

ABSTAIN:

APPROVED:

JOHN W. MINTO, MAYOR

ATTEST:

ANNETTE ORTIZ, CMC, CITY CLERK

Attachment: Exhibit A

CITY OF SANTEE
 HOURLY, GENERAL AND MANAGEMENT SALARY SCHEDULE
 EFFECTIVE OCTOBER 28, 2021

Range	Classification		A	B	C	D	E
29	Account Clerk	Hourly	22.73	23.87	25.06	26.31	27.63
		Annual	47,277.64	49,641.59	52,123.73	54,730.13	57,466.43
35	Administrative Secretary	Hourly	26.36	27.68	29.06	30.51	32.04
		Annual	54,827.80	57,569.14	60,447.65	63,470.32	66,643.73
	Assistant City Clerk	Hourly		31.69	to	45.27	
		Annual		65,916.12	to	94,165.89	
	Assistant to the City Manager	Hourly		60.65	to	81.88	
		Annual		126,158.47	to	170,314.12	
50	Assistant Engineer	Hourly	38.18	40.09	42.09	44.19	46.40
		Annual	79,406.93	83,377.52	87,546.60	91,923.64	96,520.04
58	Associate Civil Engineer / Associate Traffic Engineer	Hourly	46.51	48.84	51.28	53.85	56.54
		Annual	96,749.51	101,587.41	106,667.07	112,000.26	117,600.52
49	Associate Planner	Hourly	37.25	39.11	41.06	43.12	45.27
		Annual	77,470.33	81,343.88	85,411.15	89,682.00	94,165.89
	City Clerk	Hourly		46.41	to	64.98	
		Annual		96,529.16	to	135,164.62	
	City Manager (Single Rate)	Hourly		112.68	to	112.68	
		Annual		234,360.20	to	234,360.20	
26	Code Compliance Assistant	Hourly	21.11	22.16	23.27	24.43	25.66
		Annual	43,901.94	46,097.11	48,401.94	50,822.15	53,363.09
44	Code Compliance Officer	Hourly	32.92	34.57	36.29	38.11	40.01
		Annual	68,472.56	71,895.99	75,491.07	79,265.35	83,228.65

CITY OF SANTEE
 HOURLY, GENERAL AND MANAGEMENT SALARY SCHEDULE
 EFFECTIVE OCTOBER 28, 2021

Range	Classification		A	B	C	D	E
46	Confidential Accountant	Hourly	34.59	36.32	38.13	40.04	42.04
		Annual	71,938.99	75,535.94	79,312.76	83,278.26	87,442.29
46	Confidential Payroll Specialist	Hourly	34.59	36.32	38.13	40.04	42.04
		Annual	71,938.99	75,535.94	79,312.76	83,278.26	87,442.29
46	Confidential Secretary to City Manager/Council	Hourly	34.59	36.32	38.13	40.04	42.04
		Annual	71,938.99	75,535.94	79,312.76	83,278.26	87,442.29
	Crossing Guards ^ (Single Rate)	Hourly			14.00		
	Deputy Fire Chief	Hourly		61.06	to	83.54	
		Annual		127,000.31	to	173,767.16	
35	Development Services Technician	Hourly	26.36	27.68	29.06	30.51	32.04
		Annual	54,827.80	57,569.14	60,447.65	63,470.32	66,643.73
	Director of Community Services	Hourly		66.46	to	88.62	
		Annual		138,246.38	to	184,335.87	
	Director of Development Services	Hourly		65.76	to	88.66	
		Annual		136,791.10	to	184,412.71	
	Director of Finance / City Treasurer	Hourly		69.48	to	93.49	
		Annual		144,526.59	to	194,462.62	
	Director of Fire & Life Safety (Fire Chief)	Hourly		73.03	to	95.33	
		Annual		151,906.99	to	198,282.79	

CITY OF SANTEE
 HOURLY, GENERAL AND MANAGEMENT SALARY SCHEDULE
 EFFECTIVE OCTOBER 28, 2021

Range	Classification		A	B	C	D	E
	Director of Human Resources	Hourly		64.89	to	87.60	
		Annual		134,975.65	to	182,217.35	
	Economic Development Manager	Hourly		40.86	to	55.17	
		Annual		84,997.73	to	114,747.69	
48	Engineering Inspector	Hourly	36.34	38.15	40.06	42.06	44.17
		Annual	75,580.83	79,359.86	83,327.59	87,494.12	91,868.95
39	Equipment Mechanic	Hourly	29.10	30.55	32.08	33.68	35.37
		Annual	60,519.73	63,545.84	66,723.07	70,059.28	73,562.04
35	Equipment Operator	Hourly	26.36	27.68	29.06	30.51	32.04
		Annual	54,827.80	57,569.14	60,447.65	63,470.32	66,643.73
38	Facilities Maintenance Supervisor	Hourly	28.39	29.81	31.30	32.86	34.50
		Annual	59,043.65	61,995.81	65,095.56	68,350.56	71,767.99
25	Facilities Maintenance Technician	Hourly	20.59	21.62	22.70	23.84	25.03
		Annual	42,831.06	44,972.49	47,221.38	49,582.18	52,061.17
35	Field Inspector	Hourly	26.36	27.68	29.06	30.51	32.04
		Annual	54,827.80	57,569.14	60,447.65	63,470.32	66,643.73
	Finance Manager	Hourly		51.31	to	69.26	
		Annual		106,714.85	to	144,065.12	
	Fire Battalion Chief (2920 hours)	Hourly		38.91	to	52.75	
		Annual		113,614.16	to	154,020.31	

CITY OF SANTEE
 HOURLY, GENERAL AND MANAGEMENT SALARY SCHEDULE
 EFFECTIVE OCTOBER 28, 2021

Range	Classification		A	B	C	D	E
44	Fire Inspector	Hourly	32.92	34.57	36.29	38.11	40.01
		Annual	68,472.56	71,895.99	75,491.07	79,265.35	83,228.65
	Fire Marshal	Hourly		51.31	to	69.26	
		Annual		106,714.85	to	144,065.12	
	Graduate Intern ^	Hourly		14.00	to	19.60	
38	Human Resources Technician	Hourly	28.39	29.81	31.30	32.86	34.50
		Annual	59,043.65	61,995.81	65,095.56	68,350.56	71,767.99
53	Information Technology Analyst	Hourly	41.11	43.17	45.33	47.59	49.97
		Annual	85,512.62	89,788.21	94,278.09	98,991.76	103,941.53
	Information Technology Manager	Hourly		46.64	to	62.97	
		Annual		97,013.50	to	130,968.36	
29	Landscape and Irrigation Maintenance Worker	Hourly	22.73	23.87	25.06	26.31	27.63
		Annual	47,277.64	49,641.59	52,123.73	54,730.13	57,466.43
48	Lead Equipment Mechanic	Hourly	36.34	38.15	40.06	42.06	44.17
		Annual	75,580.83	79,359.86	83,327.59	87,494.12	91,868.95
29	Maintenance Worker	Hourly	22.73	23.87	25.06	26.31	27.63
		Annual	47,277.64	49,641.59	52,123.73	54,730.13	57,466.43
46	Management Analyst	Hourly	34.59	36.32	38.13	40.04	42.04
		Annual	71,938.99	75,535.94	79,312.76	83,278.26	87,442.29

CITY OF SANTEE
 HOURLY, GENERAL AND MANAGEMENT SALARY SCHEDULE
 EFFECTIVE OCTOBER 28, 2021

Range	Classification					
		A	B	C	D	E
	Marketing Coordinator		39.87	to	53.82	
			82,924.63	to	111,948.96	
	Office Assistant ^		14.00	to	19.60	
48	Parks & Landscape Supervisor	36.34	38.15	40.06	42.06	44.17
		75,580.83	79,359.86	83,327.59	87,494.12	91,868.95
	Principal Civil Engineer		57.65	to	78.08	
			119,902.79	to	162,399.97	
	Principal Planner		45.68	to	61.67	
			95,019.83	to	128,278.79	
	Principal Traffic Engineer		57.65	to	78.08	
			119,902.79	to	162,399.97	
38	Procurement Specialist	28.39	29.81	31.30	32.86	34.50
		59,043.65	61,995.81	65,095.56	68,350.56	71,767.99
	Public Services Manager		44.36	to	59.90	
			92,267.72	to	124,590.60	
43	Public Works Supervisor	32.12	33.72	35.41	37.18	39.04
		66,802.41	70,142.41	73,649.61	77,332.22	81,198.48
	Recreation Aide ^		14.00	to	16.59	

CITY OF SANTEE
 HOURLY, GENERAL AND MANAGEMENT SALARY SCHEDULE
 EFFECTIVE OCTOBER 28, 2021

Range	Classification		A	B	C	D	E
28	Recreation Coordinator	Hourly	22.18	23.28	24.45	25.67	26.95
		Annual	46,124.59	48,431.01	50,852.49	53,395.03	56,064.93
	Recreation Leader ^	Hourly		15.00	to	18.00	
	Recreation Services Manager	Hourly		44.36	to	59.90	
		Annual		92,267.72	to	124,590.60	
	Recreation Supervisor	Hourly		31.69	to	45.27	
		Annual		65,916.12	to	94,165.89	
36	Senior Account Clerk	Hourly	27.02	28.37	29.79	31.28	32.84
		Annual	56,198.61	59,008.56	61,959.14	65,057.03	68,310.11
	Senior Civil Engineer / Senior Traffic Engineer	Hourly		50.53	to	68.71	
		Annual		105,104.64	to	142,922.09	
	Senior Human Resources Analyst	Hourly		41.86	to	56.51	
		Annual		87,070.85	to	117,546.42	
	Senior Management Analyst	Hourly		39.87	to	53.82	
		Annual		82,924.63	to	111,948.96	
	Senior Planner	Hourly		39.72	to	53.63	
		Annual		82,625.32	to	111,546.92	
	Special Events Supervisor	Hourly		31.69	to	45.27	
		Annual		65,916.12	to	94,165.89	

CITY OF SANTEE
 HOURLY, GENERAL AND MANAGEMENT SALARY SCHEDULE
 EFFECTIVE OCTOBER 28, 2021

Range	Classification		A	B	C	D	E
	Storm Water Program Assistant^	Hourly		27.76	to	33.74	
50	Storm Water Program Manager	Hourly Annual	38.18 79,406.93	40.09 83,377.52	42.09 87,546.60	44.19 91,923.64	46.40 96,520.04
	Student Intern ^	Hourly		14.00	to	18.00	
	Technical Professional Expert ^	Hourly		50.00	to	160.00	

^Part-time, temporary status

MEETING DATE October 27, 2021

ITEM TITLE RESOLUTION AUTHORIZING THE CITY MANAGER TO EXECUTE A PROFESSIONAL SERVICES AGREEMENT WITH HMC GROUP DBA HMC ARCHITECTS FOR ARCHITECTURAL, ENGINEERING, LANDSCAPE ARCHITECTURAL AND ENVIRONMENTAL DESIGN SERVICES FOR THE SANTEE COMMUNITY CENTER PROJECT

DIRECTOR/DEPARTMENT Bill Maertz, Community Services *WM*

SUMMARY

On January 15, 2021, the City of Santee published a Request for Qualifications (RFQ) for architectural, engineering, landscape architectural and environmental design services for Phase 1 of the Santee Community Center. On February 22, 2021, 20 teams submitted packages describing their qualifications and experience. Six teams were selected for interviews. Based on the committee's evaluations and interviews, on May 12, 2021 staff recommended that the City Council authorize the City Manager to execute a professional services agreement with HMC Architects for Community Center Phase 1 design services. Staff noted that HMC Architects has demonstrated extensive and relevant experience and has proposed a fee that is considered reasonable and consistent with industry standards.

During the May 12 meeting, Councilmembers noted elevated costs of construction materials and requested a pause in the process to conduct additional analysis of community center needs and concepts. The attached Staff Report details concerns raised and staff's subsequent analysis.

ENVIRONMENTAL REVIEW

Award of the contract for architectural and engineering services is exempt from the requirements of the California Environmental Quality Act ("CEQA") pursuant to CEQA Guidelines section 15378 and section 15061 (b)(3). Construction plans for the Santee Community Center (all contemplated phases) will be subject to CEQA review as part of the design review process. HMC Architects will be responsible for preparing necessary studies and CEQA documents.

FINANCIAL STATEMENT *fm*

The adopted Capital Improvement Program budget for fiscal year 2021-22 includes an appropriation in the amount of \$1,230,000 for the requested services. This project is funded with Public Facilities and Park-in-Lieu development impact fees.

CITY ATTORNEY REVIEW N/A Completed

RECOMMENDATION *MSB*

Adopt Resolution authorizing the award of the contract for architectural, engineering, landscape architectural and environmental design services for a single-phase Community Center Project to HMC Group dba HMC Architects in an amount not to exceed \$1,150,000.

ATTACHMENT

- 1) Staff Report
- 2) Resolution



STAFF REPORT

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF SANTEE AUTHORIZING THE CITY MANAGER TO EXECUTE A PROFESSIONAL SERVICES AGREEMENT WITH HMC GROUP DBA HMC ARCHITECTS FOR ARCHITECTURAL, ENGINEERING, LANDSCAPE ARCHITECTURAL AND ENVIRONMENTAL DESIGN SERVICES FOR THE SANTEE COMMUNITY CENTER PROJECT

CITY COUNCIL MEETING
October 27, 2021

A. INTRODUCTION

The development of a community center facility has been identified as a goal in City planning documents since shortly after incorporation. The 1988 Town Center Specific Plan recommended a location north of the San Diego River near what is today the Cameron Family YMCA. Subsequent documents have reiterated the need for a community center and evaluated possible locations. In March 2017, the City Council ranked construction of the first phase of a community center as a Tier 1 priority. Particular emphasis was placed on accommodations for teen and senior programs. In February 2018, the City Council approved a professional services agreement with planning and architecture firm KTUA for a Site and Economic Analysis of the community center project. In February 2019, KTUA presented its analysis of operational needs, phasing options and projected operating revenues and expenses. On June 23, 2021 the City Council approved the Capital Improvement Program for Fiscal Years (FY) 2022-2026 allocating funding for the project.

Based on available budget and programming priorities identified by the City Council, the Site and Economic Analysis prepared by KTUA proposed a three-phase construction program with the initial phase focused on spaces accommodating senior and teen programs with additional meeting spaces and staff offices. The second phase would add event space designed for weddings, corporate meetings and other events. The third phase would add a gymnasium.

In January 2021, a Request for Qualifications (RFQ) was issued for architectural, engineering, landscape architectural and environmental design services for Phase 1 of the Santee Community Center. On February 22, 2021, 20 statements of qualifications were received. Submittals were evaluated based on criteria described in the RFQ. Six teams were invited to interview. On May 12, 2021, staff recommended HMC Architects for Phase 1 design services.

B. DISCUSSION

During the May 12, 2021 meeting, Councilmembers raised concern regarding recently elevated costs of construction materials, as well as concern over projected operating costs of the proposed facility. The City Council requested a pause in the process to

conduct additional analysis of community needs and alternatives to construction of a dedicated community center facility. Among the concepts suggested for consideration were use of vacant commercial space, partnerships with schools and other agencies for use of their facilities, partnership with mobilehome parks to deliver programming on-site, expanded use of existing City facilities and accommodation of revenue-generating uses in Phase 1.

Since May 12, staff has been evaluating the prospect of substituting a combination of the creative concepts suggested and how the City might collaborate with owners and service providers to deliver programs cost-effectively and closer to where constituents live and work. Some of these ideas are already being implemented. The City is working with the Grossmont Hospital District to offer senior health programs both at City Hall and the Herrick Community Health Library in La Mesa. Staff is also finalizing plans for bringing senior programming into Santee mobilehome parks. The City also has joint use agreements with both the Santee School District and the Grossmont Union High School District. These agreements provide access to school facilities when they are not in use by the districts. Staff will continue to identify facilities owned by other agencies that could be leveraged to expand service delivery.

Research into the use or purchase of vacant commercial space has revealed that all of the large vacant spaces in local shopping centers are the subject of negotiations with new tenants. Additionally, covenants applicable to some shopping centers specifically prohibit tax-exempt tenants or buyers. Finally, in evaluating the City's capacity to offer programming in privately-owned facilities or to co-locate with other agencies, it is necessary to keep in mind that the funds allocated to the construction of a community center - Park-in-Lieu fees and Public Facilities fees - may only be used for park acquisition and construction/expansion of City-owned property. Leasing or improvement of facilities not owned by the City are precluded.

Subsequent to the May 12 meeting, staff and HMC Architects have met with Councilmembers to discuss opportunities to minimize project costs and maximize accommodation of revenue-generating uses. Demand for use of the City's existing meeting facilities in City Hall Buildings 7 and 8 is consistently high. It is anticipated that modern and flexible facilities adjacent to Woodglen Vista Creek and the YMCA would find even greater demand. To address concerns about operating costs, HMC Architects has suggested removing the gymnasium (Phase 3) from the project scope and combining phases one and two into one flex-use space. Such a facility would integrate indoor and outdoor spaces to maximize programming capacity and revenue generation opportunities.

Also subsequent to the May 12 meeting, the City Council amended the Capital Improvement Program budget to reallocate a portion of the funding originally dedicated to the Community Center project to other City priorities. HMC Architects has reviewed the City's revised budget and current construction labor and materials pricing and concluded that the budget is sufficient to deliver a highly appealing community center of

approximately 12,500 square feet featuring flexible spaces and attractive and durable fixtures and finishes.

In conclusion, HMC Architects has demonstrated extensive and relevant experience, including the design of hundreds of campus centers, student commons, gymnasias, event centers and over a dozen community centers. HMC Architects is a California-based firm with over 80 years' experience and a staff of more than 300 in seven offices. More than 240 of the firm's staff work in offices located in San Diego, Los Angeles, and Ontario. The firm's practice focuses exclusively on civic, healthcare and education-related projects. Consultation with San Diego County cities that have recent experience with projects of similar scale and character indicates that the fee HMC Architects has negotiated for the Santee Community Center project is highly competitive.

C. STAFF RECOMMENDATION

Adopt Resolution authorizing the award of the contract for architectural, engineering, landscape architectural and environmental design services for a single-phase Community Center Project to HMC Group dba HMC Architects in an amount not to exceed \$1,150,000.

RESOLUTION NO. _____

**RESOLUTION OF THE CITY COUNCIL OF THE CITY OF SANTEE
AUTHORIZING THE CITY MANAGER TO EXECUTE A
PROFESSIONAL SERVICES AGREEMENT WITH HMC GROUP DBA
HMC ARCHITECTS FOR ARCHITECTURAL, ENGINEERING, LANDSCAPE
ARCHITECTURAL AND ENVIRONMENTAL DESIGN SERVICES
FOR THE SANTEE COMMUNITY CENTER PROJECT**

WHEREAS, the City Council has designated the construction of the Santee Community Center as a Tier 1 priority; and

WHEREAS, the Santee Community Center Project (“Project”) has been included in the FY 2022 – FY 2026 Capital Improvement Program approved by the City Council on June 23, 2021; and

WHEREAS, in accordance with Santee Municipal Code section 3.24.160, the Department of Community Services administered a formal Request for Qualifications (“RFQ”) process for architectural, engineering, landscape architectural and environmental design services for the Project; and

WHEREAS, on February 22, 2021, 20 responses to the RFQ were received and opened; and

WHEREAS, following an evaluation of responses for satisfaction of criteria established in the RFQ, staff interviewed the six teams deemed most qualified; and

WHEREAS, HMC Group DBA HMC Architects (“HMC Architects”) was determined to be the firm that best satisfied the criteria established in the RFQ; and

WHEREAS, HMC Architects has proposed a fee considered reasonable and consistent with industry standards.

NOW THEREFORE BE IT RESOLVED that the City Council of the City of Santee, California, authorizes the City Manager to execute a professional services agreement with HMC Group DBA HMC Architects in an amount not to exceed \$1,150,000 for architectural, engineering, landscape architectural and environmental design services for the Santee Community Center Project.

[Signatures on following page]

RESOLUTION NO. _____

ADOPTED by the City Council of the City of Santee, California, at a Regular Meeting thereof held this 27th day of October 2021, by the following roll call vote to wit:

AYES:

NOES:

ABSENT:

APPROVED:

JOHN W. MINTO, MAYOR

ATTEST:

ANNETTE ORTIZ, CMC, CITY CLERK

MEETING DATE October 27, 2021

ITEM TITLE PROPOSED WAIVER OF BUILDING PERMIT FEES AND OTHER COSTS FOR VICTIMS OF THE SMALL PLANE CRASH OF OCTOBER 11, 2021

DIRECTOR/DEPARTMENT Marlene Best, City Manager

SUMMARY

At the City Council meeting of October 13, 2021, Councilmember Hall requested and the City Council agreed to consider waiving City fees and costs to rebuild and/or make repairs for homeowners impacted by the October 11 small plane crash in a Santee neighborhood. These fees could include permits necessary for demolition and/or construction, repairs to solar panels, pools, fencing or accessory structures, or other needed improvements required to return homes to pre-crash conditions. Two homes were impacted with major structural damage and several others could have need to repair associated building items. In general, permit costs to demolish and rebuild the single-family homes are estimated at about \$6,500 per unit. Permits for roof, window, pool and solar system repairs for other damaged homes could average \$500 or more per unit. Additionally, City staff contracted for safety fencing surrounding the two most damaged home lots to protect the public from the safety risks on the properties. These costs totaling approximately \$2,000 would normally be passed on to the property owners. Staff would suggest that the City Council consider waiving this cost as well.

FINANCIAL STATEMENT #J for TM

The cost of various permits is related to the cost for the City to perform tasks associated with reviewing, inspecting and tracking various building processes. Interwest, as the City's building services contractor has agreed to waive their 75% contract cost. Costs for staff time, temporary fencing and other services will be absorbed in the existing General Fund budget for Fiscal Year 2021/22.

CITY ATTORNEY REVIEW N/A • Completed

RECOMMENDATION MLSB

The City Council should consider the request and provide direction to staff on whether or not to waive costs for plane crash victims, and if so to what extent.

ATTACHMENT

None.



MEETING DATE October 27, 2021

ITEM TITLE PRESENTATION OF A PROPOSED "SAFE SANTEE" PROGRAM BY THE SAN DIEGO COUNTY SHERIFF'S DEPARTMENT

DIRECTOR/DEPARTMENT Marlene Best, City Manager

SUMMARY The Sheriff's Department is proposing to implement a program called "Safe Santee," which is a collaboration between the community, businesses, the City of Santee and the San Diego County Sheriff's Department. Safe Santee is a new project that integrates existing private and publicly owned camera systems into the Sheriff's Department camera system through voluntary registration in one of two platforms: Registered Users or Exclusive Users.

Registered Users simply register their existing cameras with the Sheriff, advising that they have a system in place. When a crime occurs, Sheriff's Detectives can contact registered users in the area and request for them to review their cameras for any possible evidence. Exclusive Users register their existing camera systems with Safe Santee, as well as provide real-time, live-viewing access through their compatible camera systems. Participating businesses can choose specific cameras that they will provide access to and in what capacity those cameras can be viewed, allowing for autonomy and control over their own system.

Additionally, the Sheriff's Department would maintain pole mounted security cameras in high-profile areas, such as local parks, that can be viewed live by Deputies in the field. This would allow Deputies to get immediate video access and plan the most appropriate response to a crime or incident in progress. With this program, the Sheriff also implements a policy and practice to balance the need to protect the safety of the communities they serve, while ensuring that the public's right to privacy is safeguarded. The program is focused on high-visibility with the intent of being highly transparent.

The Sheriff's Department started this pilot program in Lemon Grove in September 2020 to improve law enforcement by reinforcing community policing, increasing officer safety, reducing victimization, shortening investigations, and helping to gain insight into previously unreported crimes. The Sheriff is now looking to expand the program into other cities and areas of the County.

The City's current agreement with the Sheriff's Department for law enforcement services does not include the services that would be provided pursuant to the Safe Santee program. Prior to implementation, the City and the County would amend the existing agreement or execute a separate agreement to set forth the details of the program, including provisions related to indemnification, retention of recorded images, and responsibility for Public Records Act requests.

FINANCIAL STATEMENT N/A *HJ for TM*

CITY ATTORNEY REVIEW N/A Completed

RECOMMENDATION *MAB* Hear report and provide direction to staff

ATTACHMENTS None



MEETING DATE October 27, 2021

ITEM TITLE WORKSHOP TO CONSIDER A REQUEST BY ELECTRIC SCOOTER COMPANY BIRD TO ENTER INTO AN AGREEMENT WITH THE CITY OF SANTEE, CALIFORNIA TO OPERATE ELECTRIC SCOOTERS WITHIN THE PUBLIC RIGHT-OF-WAY

DIRECTOR/DEPARTMENT Melanie Kush, Development Services



SUMMARY

Bird is a micromobility company based in Santa Monica, California, founded in September 2017. Bird has reached out to the City with a request to operate their scooter business in the City of Santee. The attached staff report discusses Bird and the pros and cons of permitting shared scooter use in the City. Among the benefits of scooters is a reduced reliance on private automobiles and they connect people with public transit. However, rental scooters have the potential of being abandoned on both public and private properties creating problems for Bird, local agencies and property owners. The Santee Municipal Code requires that any company seeking to provide dockless vehicles for rent in the City enter into an agreement with the City, and meet other specified requirements. Should the City Council desire to permit the rental of e-scooters, either on a trial basis or permanently, an agreement between the City and Bird, or similar e-scooter entities, would be required as well as an Encroachment Permit allowing the business to operate scooters in the public right-of-way. In deciding whether to pursue an agreement with Bird or other similar e-scooter entities, the City Council should also consider potential local speed limit restrictions on City streets.

ENVIRONMENTAL REVIEW

This item is exempt from environmental review under the California Environmental Quality Act ("CEQA") by CEQA Guidelines section 15061(b)(3).

FINANCIAL STATEMENT

Staff time associated with this item is supported by the General Fund. If City Council directs staff to enter into an agreement with Bird, the cost of processing the agreement would be covered by the applicant in a deposit account for full cost recovery.

CITY ATTORNEY REVIEW N/A Completed

RECOMMENDATION

Receive staff report, conduct public workshop, and direct staff to prepare and enter into an agreement with Bird if City Council agrees to allow Bird, or other similar companies, to operate in Santee.

ATTACHMENT

Staff Report



STAFF REPORT

WORKSHOP TO CONSIDER A REQUEST BY ELECTRIC SCOOTER COMPANY BIRD TO ENTER INTO AN AGREEMENT WITH THE CITY OF SANTEE, CALIFORNIA TO OPERATE ELECTRIC SCOOTERS WITHIN THE PUBLIC RIGHT-OF-WAY

CITY COUNCIL MEETING
OCTOBER 27, 2021

INTRODUCTION

More than half of the car trips taken annually in the United States cover less than five miles, making those journeys open to short-range alternative modes such as e-scooters and bikes. Demand for alternatives is clear; Bird provided 10 million scooter rides within 12 months of first appearing on Southern California streets and sidewalks.

Electric scooters are considered “dockless vehicles” which means a shared-mobility vehicle that is available to the public to rent in public space, does not require any specialized installations of equipment other than the vehicle itself, and can be located and unlocked using a smartphone application or by manually entering a customer’s account number. A dockless vehicle can be a manual pedal bicycle, electric pedal-assist bicycle (“e-bike”) or electric scooter (“e-scooter”), but not a motorcycle, motor vehicle or a motor-driven cycle or all-terrain vehicle. Unlike traditional transportation companies, scooter companies such as Bird would not have a physical dispatching location within the City.



Electric scooters, docked and dockless shared bikes, and other vehicle types are shrinking the physical footprint needed to move people over relatively short distances. Collectively dubbed micromobility, these services have resonated with certain consumers, required to be at least 18 years old to ride. Males under the age of 40 tend to use shared scooters more frequently than the general population. Men are more likely to use e-scooters for work-related trips, whereas women are more likely to list their top trip type as “fun/recreation”.

SCOOTER PROS AND CONS

The micromobility industry is experiencing growing pains. While the economics of the e-scooter business are attractive given the vehicles' relatively low cost and potential return on investments, challenges remain. Vandalism and theft are persistent issues. Retrieving, charging, and repositioning scooters each night can be a costly and labor-intensive exercise. Some providers have opted to flood the market with vehicles rather than bear the full cost associated with making sure a scooter or bike is nearby when a rider wants one. Ensuring user compliance with company and government-mandated policies such as helmet use to properly parking scooters once they are used is another challenge. Providers have experimented with a range of measures from the punitive (additional fees) to mandatory educational exercises.

Below are some of the basic pros and cons related to electric scooter use:

Pros: Electric scooters are a fun and sustainable way to get around town without a car. They have the potential to:

- Better connect people with public transit and reduce reliance on private cars;
- Make the most of existing space advancing “complete streets objectives”;
- Reduce greenhouse gas emissions and improve air quality;
- Improve opportunities for outdoor activity; and
- Improve local business activity.

Micromobility presents an opportunity for cities and service providers, potentially helping to address transportation challenges including congestion, emissions and air quality, and access to transit. It can assist in addressing the “last mile” dilemma, which refers to the distance that must be spanned traveling from a transportation hub such as transit terminals to a final destination.

Cons: There are legitimate concerns involving the health, safety and general welfare including:

- Riding in unauthorized areas such as on public sidewalks;
- Riding at excessive speeds;
- Abandonment of rented scooters on public and private property;
- Increased traffic and pedestrian accidents;
- Increased insurance liability and lawsuits;
- Increased cases at local healthcare and trauma facilities; and
- Higher demand for law enforcement personnel to enforce speed limits.

Cities have pressed micromobility providers to encourage and improve safety. That includes increasing helmet availability and usage, providing education to users on safe scooter techniques, and modifying vehicle designs—with, for example, more robust chassis and larger wheels better able to manage uneven pavement.

Relative to public safety, the Sheriff's office has expressed concerns that riders of rented scooters will ride at excessive speeds and abandon the vehicles in unauthorized locations such as on the trolley tracks.

BIRD RENTAL AGREEMENT AND WAIVER OF LIABILITY

To use a Bird shared e-scooter, customers must agree to the terms of the Bird Rental Agreement, Waiver of Liability and Release, last updated on August 17, 2021. The agreement specifies that the rider:

- Is the sole user;
- Is a competent vehicle operator;
- Is at least 18 years old;
- Conduct a safety inspection of the vehicle prior to riding;
- Comply with applicable helmet laws;
- Follows laws regarding use and / or operation of the vehicle including local riding, parking, and charging laws;
- Does not engage in prohibited acts such as using a cell phone, placing items on the handle bars, carrying a second person, operating while under the influence of alcohol or drugs, or parking at a prohibited parking spot.
- Will deactivate the vehicle rental within 24 hours of renting a vehicle.

Bird has developed an application for customers who can use a map in the Bird application to find the closest available Bird scooter. If the customer isn't quite ready to scoot, they can also reserve a scooter up to 30 minutes in advance. To start a ride, the customer scans the Bird's QR code with the app, uses the throttle on the right handle bar to go and pulls a brake to slow.

In addition to providing e-scooters to individual riders, Bird allows individuals to host multiple guest riders by activating multiple vehicles for rental. The host is liable for compliance with all of the terms and conditions of the Rental Agreement, and must agree that each guest personally read and agree to the Agreement. Guests are obligated to enter an e-mail address in the app and agree to all applicable terms and conditions prior to riding.

In terms of vehicle routes, riders must agree that Bird does not provide or maintain places to ride vehicles, nor does Bird guarantee that there will always be a safe place to ride a vehicle. The Rental Agreement, Waiver of Liability and Release acknowledges that roads, sidewalks, vehicle lanes, and vehicle routes may become dangerous due to weather, traffic or other hazards.

DOCKLESS VEHICLE REGULATIONS IN SANTEE MUNICIPAL CODE

Santee Municipal Code Section 10.02.020 defines a dockless vehicle as a "means of shared transportation, not otherwise regulated by the State of California, the County of San Diego, or a regional transit operator, in which the operating company leases vehicles for use in the City, but does not have a physical dispatching location within the City".

In Santee, it is unlawful for any person to provide any dockless vehicle for rent unless that person obtains a business license, provides proof of insurance, and enters into an agreement with the City regarding the operation, maintenance, and storage of the vehicles. The regulations were established by Ordinance 563 in 2019 in response to LimeBike operations and the abandonment of bicycles in the City, codified in Santee Municipal Code Section 10.10.250.

Municipal Code Section 10.22.020, also established by Ordinance 563 in 2019, states that it is unlawful for any person to ride any skateboard, scooter, roller skates, toy vehicle or similar device i) on any roadway in the City of Santee; ii) on any sidewalk in such proximity to vehicles or pedestrians as to create a hazard; and iii) on any public plaza, in any business district, or any private parking lot or property open to the public where signs forbidding such activities are displayed.

LESSONS LEARNED FROM OTHER CITIES

San Francisco was one of the first American cities to experience an influx of e-scooters. A trio of companies deployed fleets in early 2018. Responding to concerns of the public, a temporary ban on all scooters was imposed. Subsequently, a law was adopted requiring

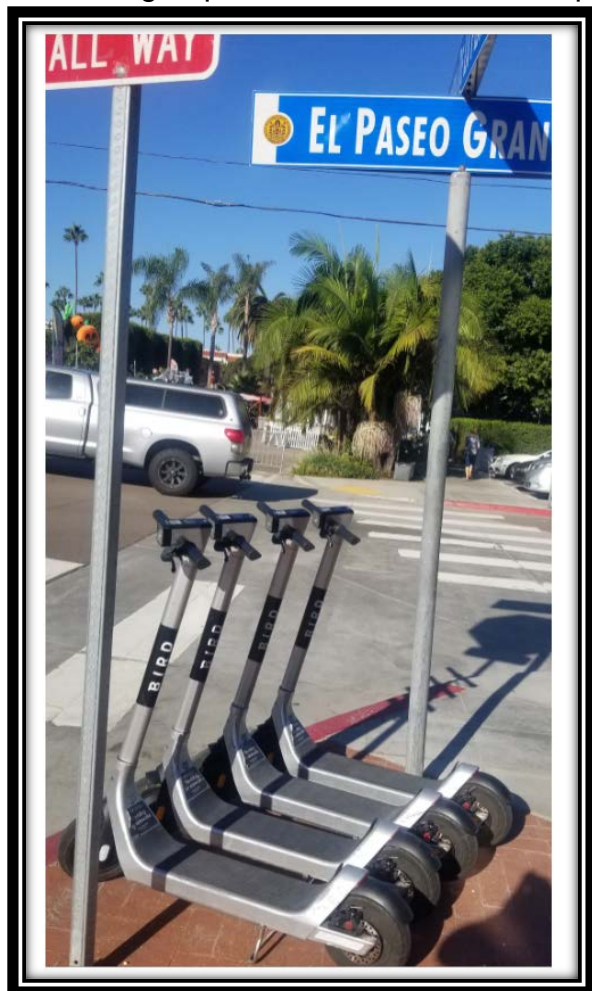


any company operating a shared, powered scooter service to have a permit. The city required operators to provide user education, be insured, share trip data with the city, have a privacy policy that safeguards user information, offer low-income options, and submit a proposed service area plan for approval. Operators

also needed to provide plans to address sidewalk riding and parking.

In San Diego, a number of companies are authorized each January and July to provide shared mobility devices for rent for six months. According to an Article in the La Jolla Light e-edition from March 25, 2021, scooters were introduced in La Jolla in 2018 and immediately drew criticism because riders were leaving them in unauthorized locations on public and private property. In July, 2019, the City of San Diego introduced the concept of “scooter corrals” for riders to park scooters. By fall 2019, 40 had been installed in La Jolla’s village. The City also imposed a “four by 40 rule”, which says that devices must be

stored in groups of no more than four, spaced at least 40 feet apart. In response to the proliferation of scooters, La Jolla residents are paying for a scooter removal service called “Scoot Scoop” to remove scooters from their private property.



In La Mesa, the City adopted a Micromobility Share Program by ordinance on April 23, 2019 to evaluate the impact of shared mobility alternatives within the City. The share program is defined as “a program establishing a licensee under a license agreement to rent, use, locate, display, offer or place for rent City-approved micromobility options within City boundaries. The Micromobility Share Program requires the City Manager or delegated staff to monitor and assess the overall performance, safety and benefits of the program.” The La Mesa ordinance includes sections on prohibited conduct, operator license agreement, indemnity and insurance requirements, grounds for termination, revocation or suspension of operator license, impoundment of devices, and enforcement.

El Cajon adopted dockless vehicle regulations in 2019 including sections on the regulation of vehicles, abandonment of vehicles, parking on street rights-of-way, and sidewalk use prohibitions. Lemon Grove’s Municipal Code addresses bicycles and skateboards and does not specifically address dockless vehicles or scooters.

MOTORIZED SCOOTER REGULATION IN CALIFORNIA VEHICLE CODE

California Vehicle Code Sections 21000 – 21296 provide regulations related to the operation of bicycles, motorized scooters (Article 5), low speed vehicles, electric personal assistive mobility devices, and the operation of electrically motorized boards. The intent of the law relative to the operation of motorized scooters is to promote the use of alternative low-emission or no-emission transportation, acknowledging that the state has severe traffic congestion and air pollution problems.

In accordance with the law, persons operating a motorized scooter on a highway at a speed less than the normal speed of traffic, moving in the same direction, and generally must ride as close as possible to the right-hand curb or edge of the roadway (subject to certain codified exceptions). Whenever a Class II bicycle lane has been established on a roadway, the rider must ride within the bicycle lane (subject to certain codified

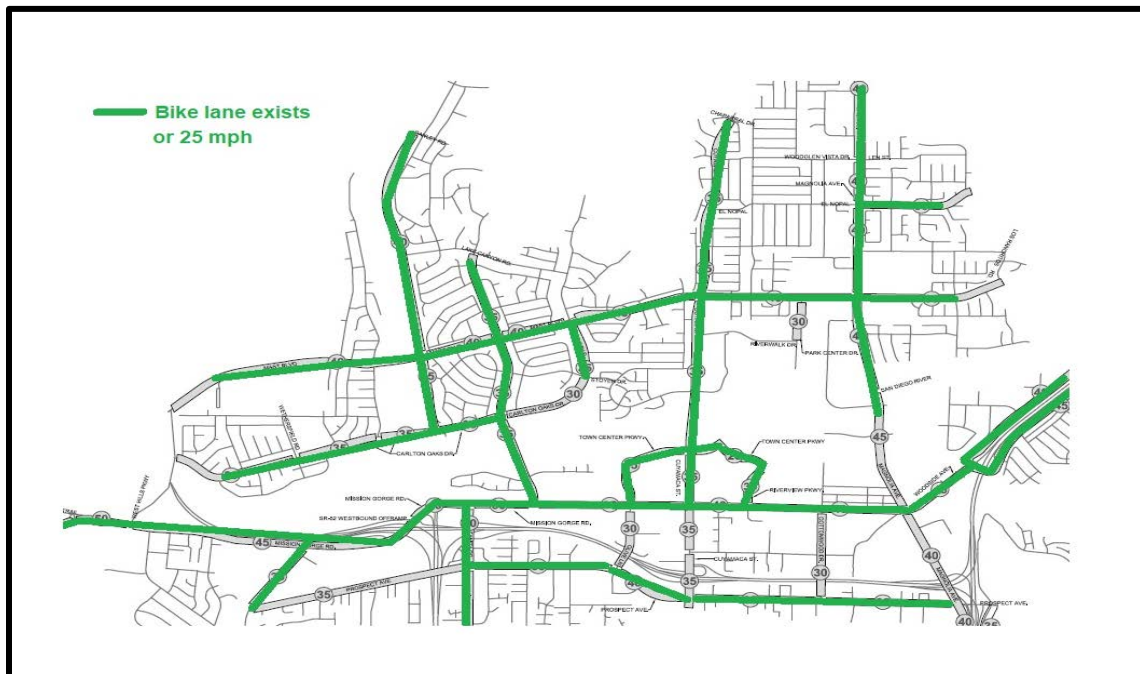
exceptions). In addition to providing guidance on where motorized scooters can ride, State law discusses speed limitations on highways as follows:

15 miles per hour limitation	Operating a motorized scooter on all highways, including bikeways, is limited to 15 miles per hour regardless of a higher speed limit applicable to the highway (Section 22411)
Within bikeway	Operating a motorized scooter on a highway with a speed limit in excess of 25 miles per hour is prohibited unless the motorized scooter is operated within a Class II or Class IV bikeway (Section 21235).
Up to 35 miles per hour outside of bikeway	A local authority may, by ordinance or resolution, authorize the operation of a motorized scooter outside of a Class II or Class IV bikeway on a highway with a speed limit of up to 35 miles per hour (Section 21235).

The state law does not prevent a local authority, by ordinance, from regulating the registration of motorized scooters and the parking and operation of motorized scooters on pedestrian and bicycle facilities and local streets and highways, if that regulation is not in conflict with the state code (Section 21225).

In deciding whether to pursue an agreement with Bird or other similar e-scooter entities, the City Council should also consider potential local speed limit restrictions on City streets. An amendment to the Municipal Code to allow scooter use on City roadways would be necessary should the City Council direct staff to move forward with “micromobility”.

The following map depicts streets with bike lanes where motorized scooters are permitted to operate:



MOBILITY ELEMENT GOALS

The overarching goal of the Mobility Element is to the provision of a balanced, interconnected multimodal transportation network that allows for the efficient and safe movement of all people and goods, and that supports the current and future needs of Santee community members and travel generated by planned land uses. Santee's mobility system plays a major role in shaping the future form and character of the City by connecting various land uses. The network is comprised of diverse elements, including roadway and freeway systems, public transit including bus and light rail, and bicycle and pedestrian infrastructure.

RECOMMENDATION

Receive staff report, conduct public workshop, and direct staff to prepare and enter into an agreement with Bird, if City Council agrees to allow Bird, or other similar companies, to operate in Santee.

MEETING DATE October 27, 2021

ITEM TITLE AN INFORMATIONAL WORKSHOP ON THE POTENTIAL FOR THE CITY OF SANTEE TO CONSIDER ELECTRIFICATION AS ONE OF THE MEASURES TO REDUCE GREENHOUSE GAS EMISSIONS AND ACHIEVE CARBON NEUTRALITY CONSISTENT WITH THE STATE OF CALIFORNIA'S DECARBONIZATION EFFORTS

DIRECTOR/DEPARTMENT Melanie Kush, Development Services



SUMMARY

On January 8, 2020, the City Council adopted the Sustainable Santee Plan (SSP) by Resolution 002-2020 and certified the related Final Environmental Impact Report. Chapter 5 of the SSP states that within two years of the State of California's final rulemaking (by the CA Air Resources Board or CARB) regarding carbon neutrality, staff will bring for City Council consideration an amendment to the SSP that includes revised measures/actions designed to achieve this goal, including but not limited to further incentives for electrification of existing buildings through SDG&E and/or any Community Choice Aggregation program in which the City participates.

Pursuant to a subsequent agreement dated June 29, 2020 between the City and environmental groups, the City agreed to hold, prior to December 29, 2021, a workshop to assess the potential for adopting an electrification ordinance, and to hold a public hearing within 60 days following the workshop. This item fulfills the workshop requirement. The City also agreed to consider an amendment to the SSP to achieve carbon neutrality within eighteen months of any rulemaking by CARB regarding carbon neutrality. To date, CARB has yet to publish final rulemaking on carbon neutrality. While the City agreed to hold this workshop and a public hearing, and to consider the actions discussed above, the City is not committed to any particular action, or inaction, regarding electrification or carbon neutrality.

Electrification refers to the process of replacing technologies that use fossil fuels with technologies that use electricity as a source of energy. The attached staff report discusses the pros and cons of electrification. Should the City Council desire to pursue electrification in new or existing buildings, staff and legal counsel will prepare a draft ordinance, conduct public outreach, and hold City Council workshops prior to introduction of an ordinance in 2022.

ENVIRONMENTAL REVIEW

This item is exempt from environmental review under the California Environmental Quality Act ("CEQA") by CEQA Guidelines section 15061(b)(3).

FINANCIAL STATEMENT

Staff time associated with this item is supported by the General Fund. If City Council directs staff to prepare an electrification ordinance, the cost of processing the ordinance would be absorbed as a General Fund expense.

CITY ATTORNEY REVIEW N/A Completed

RECOMMENDATION

Receive staff report and provide staff direction on the preparation of a draft ordinance, or wait for State code changes.

ATTACHMENTS

Staff Report



STAFF REPORT

AN INFORMATIONAL WORKSHOP ON THE POTENTIAL FOR THE CITY OF SANTEE TO CONSIDER ELECTRIFICATION AS ONE OF THE MEASURES TO REDUCE GREENHOUSE GAS EMISSIONS AND ACHIEVE CARBON NEUTRALITY CONSISTENT WITH THE STATE OF CALIFORNIA'S DECARBONIZATION EFFORTS

**CITY COUNCIL MEETING
OCTOBER 27, 2021**

A. INTRODUCTION

Electrification refers to the process of replacing technologies that use fossil fuels such as coal, oil and natural gas with technologies that use electricity as a source of energy. In California, about 50 cities have adopted building codes to reduce reliance on natural gas.

Several cities in California are considering or have adopted ordinances and building codes to further the State's goal of achieving carbon neutrality by 2045 in accordance with Executive Order B-55-18 and Senate Bill 100. Building codes that go beyond current California Energy Code (Title 24) requirements are commonly referred to as "reach" codes or "stretch" codes. These codes play into EV readiness plans and help in implementing Climate Action Plans. Approximately 39 cities have adopted all-electric reach codes.

Electrification ordinances typically focus on new buildings, and can include a variety of exceptions such as permitting gas lines to common areas for barbeques. The City of Berkeley is the first city in the state developing a strategy for the electrification of existing buildings which would involve construction retrofits.

Cities conducting electrification studies include Sacramento and Livermore, with Chico, Dublin, South Pasadena, Burbank and Cupertino using comprehensive electrification policies and providing educational outreach. Locally, Carlsbad has adopted reach codes and Solana Beach is actively working to encourage electrification of appliances while allowing exceptions for certain amenities that are traditionally connected to natural gas lines such as for cooking. Encinitas adopted an electrification ordinance at its City Council meeting of October 13, 2021.

B. PROS AND CONS

Electrification creates cost efficiencies for developers while reducing greenhouse gas emissions. In Santee, certain developers have already constructed electric-only buildings such as the recent Ariana community by City Ventures located on the east side of Caribbean Way. The new condominiums feature all electric appliances including induction stoves, electric water heaters and dryers, and rooftop solar systems. Electric appliances such as induction cooktops, and devices using other advances in technology, improve indoor air quality. Developer construction costs are reduced by avoiding the need to install

natural gas infrastructure to every residence. Increased monthly household electrical bills are offset with the operation of rooftop solar systems.

Users of electrical systems are anticipated to avoid expected price increases of natural gas as fewer people utilize gas infrastructure. Potential equity issues for those without the resources to retrofit home appliances and improve indoor air quantity may become more apparent. A common concern of households that enjoy cooking is the switch from gas to electric stoves. The switch from natural gas also entails retrofitting electrical outlets from 110 to 220 volts and paying for electrical panel upgrades. While “retro-fit-ready” products are beginning to become available for consumers, the market for such commodities is still evolving. The City of Berkeley estimates that it costs an average of \$20,000 per residence for a complete gas to electric retrofit.

C. PATHWAYS TO NEW CONSTRUCTION ELECTRIFICATION

Cities have the flexibility to adopt energy codes that are more restrictive than the current requirements of California Title 24. Two different approaches to achieve electrification in new construction are used. One is to amend local health and safety codes and the other is to amend the local energy code.

Amending the energy code requires California Energy Commission (CEC) approval including requirements for a cost-effectiveness study, community outreach and education. The approach provides flexibility in that it is outside of Title 24. Amending the municipal / health and safety code does not require CEC approval or a cost-effectiveness study but does require community outreach and education. Stakeholder engagement includes working with builders and utility providers, and engaging the general public with information and demonstrations on electric buildings, resiliency, and cooking on electric appliances.

A state-wide reach codes program paid for by California utility providers allows local agencies to adopt reach codes which are already considered cost-effective. The Encinitas code was approved as a reach code proving cost-effectiveness as required by the CEC. This ordinance allows limited exceptions for equipment such as pizza ovens and woks. It also exempts certain buildings, but such buildings must be “electrification ready”.

Another option is for local governments to simply require adherence to California Title 24. Currently, the City of Santee uses state codes approved in 2019. Every three years, the State provides updated codes including updated energy codes. The next code update cycle is set for 2022 followed by another in 2025. With each code update, the CEC typically strengthens the State’s energy code.

D. RECOMMENDATION

Receive staff report and provide staff direction on the preparation of a draft ordinance, or wait for State code changes.

MEETING DATE October 27, 2021

ITEM TITLE RESOLUTION OF THE CITY COUNCIL OF THE CITY OF SANTEE,
CALIFORNIA REINSTATING THE VACATION CASH OUT PROGRAM

DIRECTOR/DEPARTMENT Tim K. McDermott, Director of Finance 

SUMMARY

The Vacation Cash Out Program (“Program”) was established by the City of Santee in July 1999 whereby eligible management employees are able to cash out up to 40 hours of unused vacation time (Senior and Mid-Management) or up to 80 hours (Executive Management) per fiscal year. In order to be eligible to cash out vacation time the employee must have taken a minimum of 80 hours of vacation during the fiscal year of which 40 hours must have been taken consecutively. The Program is only provided to management employees as it is expected that management employees ensure that their non-management staff are able to utilize their vacation time. This is a benefit that is included in every management employee’s management services agreement.

With the uncertainty created by the COVID-19 pandemic, in June 2020 the Program was suspended as a cost saving measure with the adoption of the fiscal year 2020-21 operating budget via Resolution No. 064-2020. This was the second such time the Program had been suspended, with the first being from October 2009 through June 2015 as a result of the impacts of the Great Recession.

Fortunately, to date the pandemic’s impact on City revenues has been less than anticipated. Due in part to many management employees’ role as essential workers during the pandemic, a number of management employees currently have reached or are about to reach their vacation balance accrual limit at which point they would cease to accrue additional vacation time until their balance is brought down below the accrual limit. These balances are in addition to any Limited Pandemic Leave, an overflow leave balance employees that were at their vacation accrual limit were allowed to accumulate through June 30, 2021, that an employee may have and which must be used by December 31, 2021 or forfeited. Of the 34 management employees, nine are either currently at their vacation accrual limit or within two pay periods of being so, with several others approaching their limit.

Given the City’s current fiscal status in particular as it relates to impacts from the pandemic, and in recognition of the vacation accrual balances carried by many management employees, staff recommends that the Vacation Cash Out Program be reinstated.

FINANCIAL STATEMENT *fm*

The estimated annual cost to reinstate the Program is \$40,000. It is expected that a portion of the current fiscal year cost impact will be offset by personnel cost savings from positions that have been vacant during a portion of the fiscal year. If reinstated, the necessary budget adjustment will be included in the fiscal year 2021-22 mid-year budget amendments in February 2022.

CITY ATTORNEY REVIEW

N/A Completed

RECOMMENDATION *MSB*

Adopt the attached resolution reinstating the Vacation Cash Out Program effective October 27, 2021.

ATTACHMENT

Resolution

RESOLUTION NO. _____

**RESOLUTION OF THE CITY COUNCIL OF THE CITY OF SANTEE, CALIFORNIA
REINSTATING THE VACATION CASH OUT PROGRAM**

WHEREAS, on July 25, 1998 the Vacation Cash Out Program was established whereby Senior and Mid-Management employees are able to cash out up to 40 hours of vacation time and Executive Management employees are able to cash out up to 80 hours of vacation time per fiscal year once certain eligibility criteria are met; and

WHEREAS, said eligibility criteria include the requirement to have taken at least 80 hours of vacation time during the fiscal year of which 40 hours must have been taken consecutively; and

WHEREAS, the Vacation Cash Out Program is a benefit that is included in every management employee's management services agreement; and

WHEREAS, as a result of the adverse fiscal impacts experienced by the City from the Great Recession, the Vacation Cash Out Program was temporarily suspended on October 14, 2009 via Resolution No. 047-2009 and reinstated on June 24, 2015 via Resolution No. 054-2015; and

WHEREAS, in anticipation of the unknown fiscal impacts to be experienced by the City as a result of the COVID-19 pandemic, the Vacation Cash Out Program was again temporarily suspended on June 24, 2020 via Resolution No. 064-2020; and

WHEREAS, given the City's current fiscal status in particular as it relates to the impacts from the COVID-19 pandemic, and in recognition of the vacation accrual balances currently being carried by many management employees, it is recommended that the Vacation Cash Out Program be reinstated.

NOW, THEREFORE, BE IT RESOLVED, by the City Council of the City of Santee, California that the Vacation Cash Out Program be reinstated upon adoption of this Resolution.

RESOLUTION NO. _____

ADOPTED by the City Council of the City of Santee, California, at a regular meeting thereof held this 27th day of October, 2021, by the following roll call vote to wit:

AYES:

NOES:

ABSENT:

APPROVED:

**_____
JOHN W. MINTO, MAYOR**

ATTEST:

**_____
ANNETTE ORTIZ, CMC, CITY CLERK**