



Terra Firma Consulting

Sound | Sustainable | Strategic

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October 15, 2014

Stacey Ray, Associate Planner
City of Olympia
P.O. Box 1967
Olympia, WA 98507

RE: Statement of Qualifications for City of Olympia Urban Forest Strategic Management Plan

I am pleased to submit this proposal in response to the request for qualifications (RFQ) for the *City of Olympia Urban Forest Strategic Management Plan*. I welcome this opportunity to provide assistance to the City in developing sustainable strategies in how the Program should be best organized, administered and funded going forward.

I offer over 20 years of experience in community forestry, assisting in the development and management of city forestry programs with several communities in the Puget Sound region, including Seattle, on projects ranging from tree ordinances and forest stewardship training to management and strategic urban forestry planning. Over the years, I have honed my skills of facilitating and outreach to ensure a successful public process. My extensive tenure as a public employee, coupled with serving as a city councilmember, gives me the necessary perspective to fully comprehend the balance of policy and regulation with resource management and community engagement.

I commend the City of Olympia for their commitment to revitalize their program in order to manage the urban forest in a more sustainable way. I am confident that my proposed approach will result in quality outcomes that will help the community meet their desired tree goals.

Thank you for the opportunity to submit my qualifications and approach for this project. If selected, I will gladly sign the City's Professional Services Agreement included in the RFQ. I look forward to discussing my project approach and answer any questions you may have. Please feel free to contact me.

Respectfully submitted,

Elizabeth G. Walker, Principal
Terra Firma Consulting

Introduction

The City of Olympia's urban forestry program has long since been the premier regional model for effective regulations and proactive management and stewardship efforts. This fact is a solid basis in which to revitalize the program to become more effective and sustainable today. The challenges of shifting political leadership, limited resources (including funding), and maintaining a minimum level of service actually provide an opportunity to introduce a creative way to assess where the city is and where it wants to go regarding urban forestry. As an experienced municipal forester, I have facilitated several cities through an effective strategic planning process that successfully produces a perfect tool for the community to develop and sustain their urban forestry program.

Project Approach

The purpose of Olympia's Urban Forest Strategic Management Plan (the Plan) is to provide a logical, sustainable direction for the city planning, policy, standards, goals, and education/outreach related to trees on both public and private properties for many years to come. The Plan is developed to align with goals in the Comprehensive Plan and be "growth" friendly to attract appropriate commercial and residential development that supports desired design standards. It should continue to promote environmental responsibility through policy, education, and outreach on the values of trees. The plan is driven by input and visions from citizens, city staff, and volunteers with implementation that is monitored and adaptable over time. It should reflect the communities shared vision for the urban forest managed by the city and layout a path for sequential implementation including annual budgets and future activities.

My approach relies on foundational concepts by Clark et al (1997) and my recent experience composing similar plans for other local communities (see 'Project References'). I propose working closely with Olympia's city staff and stakeholders to align my methods and approach with the needs and desires of the City. The Plan differs from a typical management plan by providing a framework for establishing overarching goals for the City's urban forest resources and broader community goals, as well as specific action items and time frames to be completed by the City and the community.

The Plan will bring together: (1) an assessment of the City's existing forest resource and review of current and past plans and projects to identify working systems; (2) coordination among city staff and stakeholders to refine the program's vision, objectives, and priorities; and (3) overall management strategies, policies, and mechanisms directly impacting urban forest health, quality and commitment.

Urban forests are complex, integrated socio-ecological systems and differ from forests in natural settings by the large number of "agents of change" and frequency with which changes occur (Grove et al 2006). Cooperation among key stakeholders can have a significant influence on the effective quality of the urban forest. This is essential to maintain a common and productive vision of what the urban forest should contain, and what overall benefits to work toward.

Urban forest resource management success is influenced by many factors including funding, staffing, local regulations, available human resources and more. Effective resource management provides systematic solutions to employees and stakeholders (including private land owners). The urban forest resource management strategy is the umbrella under which all activities are organized and implemented.

It is recommended that the Plan include performance benchmarks for monitoring and gauging progress (sustainability) towards the goals, recommendations and strategies agreed upon in the plan over the ten or twenty-year planning period.

PROJECT SCOPE OF WORK – SCHEDULE – ESTIMATED HOURS PER TASK

1. ASSESS EXISTING CONDITIONS & PERSPECTIVES *Dec. 2014 – Jan. 2015* (24 hours)
 - a) **Review Relevant Documents.** Review of existing plans and documents as well as the fundamentals of successful relevant projects and programs in order to build upon and make ties or references in the plan in ways that maintain consistency in city planning and policy.
 - b) **Perform Staff and Stakeholder Interviews.** In order to prepare for effective interviews, I would like to distribute an urban forest sustainability model matrix to guide the discussion. The matrix has numerous criteria of an urban forest program with various levels of performance and objectives. The matrix is comprehensive and covers all aspects of a program in three major categories: Vegetative Resource, Resource Management, and Community Resource (see Attachment – Urban Forest Sustainability Matrix: Resource Management Criteria and Indicators). The intent is to bring the level of awareness of the intricacies of urban forestry and have the staff and advisory committee help identify the desired level and key objectives for Olympia’s program.

After each participant has reviewed and considered the matrix material (in an informal survey format), I would use it as a framework in inquiries with staff to determine key priorities and desired performance levels to achieve for the City. Other information, such as what is working and not working in operations and policy, will also be gathered to identify areas of improvement or success that can be leveraged.

I would co-facilitate a meeting with the Advisory Committee to guide a discussion about their responses on the matrix exercise and seek input on options for engaging community volunteers and partner organizations.
 - c) **Prepare a summary report** of existing and future challenges of the program on all levels (staff, funding, policy, database, and management tools) particularly in relation to administration, engagement, and customer service .
2. DRAFT PLAN FRAMEWORK *January 2015* (20 hours)
 - a) **Draft urban forest vision, key objectives and performance benchmarks.** Refine vision statement and priorities and desired levels as a result of connecting the research in Task 1 and the results of the survey identifying the supported priorities, goals and objectives for the strategic plan. Present framework to City staff for feedback and agreement on direction.
 - b) **Outline key objectives and possible strategies for draft plan.** These will be generated based on existing City’s goals and vision and researching model programs that will get Olympia toward its desired urban forestry program. The goals will reflect identified priorities already expressed, such as how to organize, fund and administer the Program.
3. SUBMITTAL & PRESENTATION OF DRAFT PLAN *February - March 2015* (28 hours)
 - a) **Produce draft plan** to include the elements stated in the RFQ (p. 2) – executive summary, brief historical perspective and summary of urban forest benefits, and current conditions of the urban forest and the City program, but will focus on recommendations of goals (performance benchmarks), priority objectives , and both short-term and long-term strategies (action steps). A section of the plan will explore possible strategies (actions)

based on the three requested funding & resource scenarios. Submit Draft for review by City staff and possibly advisory committee.

- b) **Refine draft with staff and committee feedback** to produce final draft for submittal by *March 20, 2015*.

4. PRESENTATION OF FINAL PLAN TO CITY COUNCIL *April 2015* (8 hours)

Make any final edits as directed by staff and make a presentation with staff to City Council on *April 21, 2015*.

Consultant rate: \$125/hour

80 hours

TOTAL:

\$10,000

PROJECT REFERENCES

City of Shoreline Tree Board Development and Urban Forest Strategic Plan (2013-14); Phase I Strategy Implementation (2014)

Maureen Colaizzi, Project Manager - Parks, Recreation and Cultural Services

City of Shoreline 17500 Midvale Avenue N | Shoreline WA 98133

206-801-2603 | mcolaizzi@shorelinewa.gov

<http://shorelinewa.gov/government/departments/parks-recreation-cultural-services/projects-and-plans/urban-forest-strategic-plan>

City of Snoqualmie Urban Forest Strategic Plan (2014)

Phil Bennett, Parks Arborist

City of Snoqualmie PO Box 987 | Snoqualmie WA 98065

206-491-0031 | pbennett@ci.snoqualmie.wa.us

http://www.ci.snoqualmie.wa.us/DesktopModules/Bring2mind/DMX/Download.aspx?Command=Core_Download&EntryId=21432&PortalId=0&TabId=133

Thurston County Urban Forest Management Plan and Code Update (2013), not yet adopted

Steve Duh, CPRP Principal (Lead Project Manager)

Conservation Technix, Inc. PO Box 12736 | Portland OR 97212

503-989-9345 | steve@conservationtechnix.com

<http://www.co.thurston.wa.us/planning/forests/forests-management-plan.html>

Urban Forest Sustainability Matrix

Resource Management Criteria and Indicators

C = Current Level; D = Desired Level

* = Top Objective

Criteria	Performance Indicator Spectrum						*	Key Objective
	Low		Moderate		Good		Optimal	
1. Tree Inventory	No inventory		Complete or sample-based inventory of publicly-owned trees		Complete inventory of publicly-owned trees AND sample-based inventory of privately-owned trees.		Complete inventory of publicly-owned trees AND sample-based inventory of privately-owned trees included in city-wide GIS	Comprehensive inventory of the tree resource to direct its management. This includes: age distribution, species mix, tree condition, risk assessment.
2. Canopy Cover Assessment	No inventory		Visual assessment		Sampling of tree cover using aerial photographs or satellite imagery; I-Tree;		Mapped urban tree cover using aerial photographs or satellite imagery included in city-wide GIS	High resolution assessments of the existing and potential canopy cover for the entire community.
3. City-wide management plan	No plan		Existing plan limited in scope and implementation		Comprehensive plan for publicly-owned, intensively- and extensively-managed forest resources accepted and implemented		Strategic multi-tiered plan for public and private intensively- and extensively-managed forest resources accepted and implemented with adaptive management mechanisms.	Develop and implement a comprehensive urban forest management plan for private and public property.
4. Municipality-wide funding	Funding for only emergency reactive management		Funding for some proactive management to improve the public portion of urban forest.		Funding to provide for a measurable increase in urban forest benefits.		Adequate private and public funding to sustain maximum urban forest benefits.	Develop and maintain adequate funding to implement a city-wide urban forest management plan

Urban Forest Sustainability Matrix

<p>5. City staffing</p>	<p>No staff.</p>	<p>Limited trained or certified staff.</p>	<p>Certified arborists and professional foresters on staff with regular professional development.</p>	<p>Multi-disciplinary team within an urban forestry program.</p>	<p>Employ and train adequate staff to implement city-wide urban forestry plan</p>
<p>6. Tree establishment, planning and implementation</p>	<p>Tree establishment is ad hoc (no plan or budget)</p>	<p>Limited tree establishment occurs on an annual basis with minimal budget.</p>	<p>Tree establishment is directed by needs derived from a tree inventory or strategy</p>	<p>Tree establishment is directed by needs derived from a tree inventory and is sufficient to meet canopy cover objectives (see Canopy Cover criterion in Table 1)</p>	<p>Urban Forest renewal is ensured through a comprehensive tree establishment program driven by canopy cover, species diversity, and species distribution objectives</p>
<p>7. Maintenance of publicly-owned, intensively managed trees (not open space)</p>	<p>No maintenance of publicly-owned trees</p>	<p>Publicly-owned trees are maintained on a request/reactive basis. No systematic (block) pruning.</p>	<p>All publicly-owned trees are systematically maintained on a cycle longer than five years.</p>	<p>All mature publicly-owned trees are maintained on a 5-year cycle. All immature trees are structurally pruned.</p>	<p>All publicly-owned, intensively managed trees are maintained to maximize current and future benefits. Tree health and condition ensure maximum longevity.</p>
<p>8. Tree Risk Management</p>	<p>No tree risk assessment/remediation program. <u>[Request based/reactive system?]</u> The condition of the urban forest is unknown</p>	<p>Sample-based tree inventory which includes general tree risk information; Request based/reactive risk abatement program system.</p>	<p>Complete tree inventory which includes detailed tree failure risk ratings; risk abatement program is in effect eliminating hazards within a maximum of one month from confirmation of hazard potential.</p>	<p>Complete tree inventory which includes detailed tree failure risk ratings; risk abatement program is in effect eliminating hazards within a maximum of one week from confirmation of hazard potential.</p>	<p><i>All publicly-owned trees are managed with safety as a high priority.</i></p>

Urban Forest Sustainability Matrix

9. Tree Protection Policy Development and Enforcement	No tree protection policy	Policies in place to protect public trees.	Policies in place to protect public and private trees <u>[with enforcement desired]</u> .	Integrated municipal wide policies that ensure the protection of trees on public and private land are consistently enforced and supported by significant deterrents	The benefits derived from large-stature/mature trees are ensured by the enforcement of municipal wide policies.
10. Publicly-owned natural areas management planning and implementation	No stewardship plans or implementation in effect.	Reactionary stewardship in effect to facilitate public use (e.g. hazard abatement, trail maintenance, etc.)	Stewardship plan in effect for each publicly-owned natural area to facilitate public use (e.g. hazard abatement, trail maintenance, etc.)	Stewardship plan in effect for each publicly-owned natural area focused on sustaining the ecological structure and function of the feature.	The ecological structure and function of allpublicly-owned natural areas are protected and, where appropriate, enhanced.



ELIZABETH G. WALKER

EDUCATION

B.A. Geology with Biology minor, 1985, Whitman College, Walla Walla, WA

M.F.R. Urban Horticulture, 1993, College of Forest Resources, University of Washington, Seattle, WA; Masters project: "A Citizens Guide to Urban Forest Management in the Town of Clyde Hill" - APA/PAW Merit Award 1994.

Certified Arborist, International Society of Arboriculture, since 1993, PN-0402a

Graduate, American Society of Consulting Arborists Academy, February 2002, Chicago, IL.

EXPERIENCE

2011 - **Natural Resource/Urban Forestry Consultant.** Terra Firma Consulting. Owner.

- King Conservation District - contract Outreach Lead & Legislative Advisor (2011-12)
- City of Covington - contract project manager, Urban Forestry Strategic Plan (2012)
- City of Snoqualmie - on Plan-It Geo consulting team, Tree Canopy Project (2012); primary consultant for Urban Forest Strategic Plan (2014)
- City of Shoreline - Urban Forest Strategic Plan & Tree Board Development (2012-)
- Thurston County - UGA Urban Forest Management Plan and Regulations (2013)
- City of Edmonds - Comprehensive Tree Code Revisions (2014)

2002 - 2012 **Consulting Arborist - Urban Forester.** Sound Tree Solutions, Inc. President. Tree risk assessment; tree appraisals; community forest management plans; tree plans for permitting; municipal forestry strategic plans; tree regulation development & adoption; Tree Board development; public education.

City of Clyde Hill - City arborist; landscape and plan reviews utilizing my master's project guide (1993-96; 2002-12)

City of Bainbridge Island - facilitated the initial effort in developing an urban forest management (*strategic*) plan (2002); contracted and delivered introductory sections of management plan (2004-2005)

City of Bellevue - Forest Enhancement project manager: Forest Park Meadows Open Space (2004)

Village of Beaux Arts (WABA) - Forest Management Plan for Woodlands Common (2006)

City of Lake Forest Park - Tree Ordinance Update and Implementation, Technical Assistance; City arborist (2006-12)

City of Medina - City Arborist, hazard tree evaluations on residential property (2007-12)

City of Mercer Island - Public Works contract arborist - development of street tree standards & specifications (2007); on-call consulting arborist for ROW trees (2011)

City of Mountlake Terrace - Tree assessment in parks & unimproved ROW (2006, 2007)

City of Renton - On consultant team for an Urban & Community Forestry Strategic Plan (2008)

City of Seattle - Vegetation Management Plan for Golden Gardens Park (2003); consultant for major revision of private tree regulations (2008-2009)

Town of Woodway - Town Arborist (2004-2012), Forest Management Plan for the Woodway Reserve (2004), Backyard Forest Stewardship Program (2006)

HDR Engineering, Inc.
KPG Engineering, Inc.
Quadrant Homes
Salmon Bay Design Group
Studio Meng Strazzara
HOS Development
Trilogy Golf Club

KBS Development Corporation
Providence Point Homeowners Assns*
Redmond Ridge Residential Owners Assn*
Snoqualmie Ridge Residential Owners Assn*
Tree Farm Homeowners Association
Trilogy Residential Community Association*
Lake Washington School District

*Annual assessment & management contracts

2002 - 2006 **Urban Forester.** City of Kirkland, WA. First staff forester for the City (part-time); served on the Natural Resource Management Team developing a city Natural Resource Management (*strategic*) Plan (release fall 2003); developed public and private tree regulations; helped the City achieve Tree City USA designation; provided technical assistance to Parks, Public Works and current Planning, particularly with plan, report review and development of tree standards (assessment, protection, selection, installation); wrote a successful application to receive a Metro King County stewardship grant for street tree inventory project (summer/fall 2003) and a WA DNR grant (2004) to complete project; designed tree inventory “software” with City’s GIS department.

1996 - 2002 **Urban Forester.** City of Vancouver, WA. First full-time urban forester for the City; developed and administered private tree regulation; staffed and facilitated the Urban Forestry Commission; reviewed and approved tree retention and protection plans; developed tree selection lists; coordinated street tree inventory utilizing interns; supervised various part-time program assistants; developed a program budget; developed and coordinated several outreach programs such as heritage trees, NeighborWoods, community tree plantings, Arbor Day, and Tree City USA.

1994 – 1996 **Community Assistance Forester.** Washington Dept. of Natural Resources, Urban and Community Forestry program, Olympia, WA. Visited several communities throughout the state and offered assistance in board and program development, grant funding opportunities, and Arbor Day support; coordinated the Tree City USA program for the state.

TEACHING

“The Landscape Professional as a Writer” PNW ISA Education Course, Victoria, B.C., November 2012; Mercer Island, WA, April 2013.

“The Basics of Tree Appraisal” PNW ISA Education Course, Victoria, B.C. (Royal Roads University), June 2010; Longview, WA, June 2009.

Instructor. “Topics in Arboriculture” Lake Washington Technical College, Kirkland, WA, Winter Qtr - 2008, 2009.

Guest Speaker at College of Forest Resources, Center for Horticulture (UW) courses:
EHUF 470 - Urban Forest Landscapes: Clyde Hill Case Study (Bradley) 2003 - 2009.
EHUF 401 - Urban Forest Planning & Management: Hazard Tree Management on Historic Officers Row, Vancouver, WA Case Study (Wagar/Wolf) 1999, 2000.

AFFILIATIONS

International Society of Arboriculture member since 1993; Chapter Representative on ISA Council of Representatives (COR) since 2010, Secretary on COR Executive Committee; member of ISA Test Committee – Certified Arborist and Municipal Specialist (2011-14)

Pacific Northwest Chapter of International Society of Arboriculture member since 1993. Board positions: Treasurer 1998-2001, Vice President 2001-02, President 2002-04, Past President 2004-2006; ISA Council Representative 2010 -

Society of Municipal Arborists, member 1996-2012.

American Society of Consulting Arborists, member 2004-2012.

Washington State Evergreen Communities Partnership Task Force, Professionals in Land Use Planning member, 2009

Duvall Planning Commission, February 2006 – May 2007; chair in spring 2007

Duvall City Council, Position 3, appointed September 2007; elected 2009-2012; Mayor Pro-tem 2009

Snoqualmie Watershed Forum, vice-chair 2007 – 2010, chair 2010 - 2012