

CLAREMONT CITY COUNCIL

MEETING AGENDA

“We are a vibrant, livable, and inclusive community dedicated to quality services, safety, financial strength, sustainability, preservation, and progress with equal representation for our community.”

City Council Chamber
225 Second Street
Claremont, CA 91711



Tuesday
January 28, 2025
6:30 PM

COUNCILMEMBERS

COREY CALAYCAY
MAYOR

JED LEANO

ED REECE

JENNIFER STARK

SAL MEDINA

Meetings are open to the public for in-person attendance. The meeting will be live streamed via Zoom, technology permitting. Members of the public will not be able to provide public comment via Zoom. To watch the meeting via Zoom, use the following link: <https://zoom.us/j/256208090>. To listen via telephone dial (213)338-8477, Webinar ID: 256 208 090. The recorded meeting will be uploaded to the City website and archived.

OPTIONS FOR PUBLIC COMMENT

Public comment may be provided by one of the following methods. Each speaker will be given up to three (3) minutes to provide their comment.

IN-PERSON LIVE COMMENTS

When the item you wish to speak to is announced, please proceed to the speaker's podium one by one.

E-MAIL/MAIL

Written comments sent to the City Clerk's office will be distributed to the City Council and imaged into the record of the meeting. Email: cityclerk@claremontca.gov. Mail: PO Box 880, Claremont, CA 91711. Written comments submitted after publication of the agenda will be made available in the document archive system on the City website as soon as possible - www.claremontca.gov.

For assistance, comments, or more information please contact the City Clerk's Office:

email: cityclerk@claremontca.gov; phone: (909) 399-5461 or (909) 399-5463.

CALL TO ORDER THE MEETING OF THE CITY COUNCIL

PLEDGE OF ALLEGIANCE

MOMENT OF SILENCE

ROLL CALL**CLOSED SESSION REPORT****CEREMONIAL MATTERS, PRESENTATIONS, AND ANNOUNCEMENTS****Recognitions:**

California Conservation Corps for Trail Maintenance Efforts in the Claremont Hills Wilderness Park

City of Claremont Reserve Park Rangers for Service to the Community

Staff Introduction:

Amanda Alvarez, Community Services Office Assistant

Announcement:

Claremont Helen Renwick Library Updates

FEDERAL HOLIDAYS AND OBSERVANCES**Holidays This Month and Upcoming:**

New Year's Day, January 1, 2025

Birthday of Martin Luther King, Jr., January 20, 2025

Inauguration Day, January 20, 2025

MAYOR AND COUNCIL**Council Item****1. APPOINTMENT OF A COMMUNITY MEMBER TO THE TRI-CITY MENTAL HEALTH GOVERNING BOARD**

Recommendation: The City Council Ad Hoc Nominating Committee recommends the City Council appoint Sandra Grajeda to the Tri-City Mental Health Governing Board for a term commencing February 1, 2025, and expiring on January 31, 2026.

Council Assignment Reports

City Councilmembers may serve as representatives on regional organizations. This time is allocated for reports about their activities. For information about the Council's local, intergovernmental and regional appointments please visit the City website: <https://www.claremontca.gov/Government/City-Council/Council-Appointments>.

CITY MANAGER REPORT

PUBLIC COMMENT

The Council has set aside this time for persons who wish to comment on items that are not listed on the agenda, but are within the jurisdiction of the City Council. Members of the public will have the opportunity to address the City Council regarding all items on the agenda at the time the Council considers those items.

General public comment will be taken for 30 minutes and will resume later in the meeting if there are speakers who did not get an opportunity to speak because of the 30-minute time limit.

The Brown Act prohibits the City Council from taking action on oral requests relating to items that are not on the agenda. The Council may engage in a brief discussion, refer the matter to staff, and/or schedule requests for consideration at a subsequent meeting.

CONSENT CALENDAR

All matters listed on the Consent Calendar are considered routine. The City Council may act on these items by one motion following public comment. Only Councilmembers may pull an item from the Consent Calendar for discussion, reading of resolutions and ordinances will be waived.

2. RESIGNATION OF TRAFFIC AND TRANSPORTATION COMMISSIONER BUFF BROWN

Recommendation: Staff recommends the City Council accept with regret the resignation of Buff Brown from the Traffic and Transportation Commission effective January 24, 2025.

Attachment(s): Resignation of Traffic and Transportation Commissioner Buff Brown

3. ADOPTION OF A RESOLUTION APPROVING THE CITY WARRANT REGISTER

Recommendation: Staff recommends the City Council adopt A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, ALLOWING CERTAIN CLAIMS AND DEMANDS AND SPECIFYING THE FUNDS OUT OF WHICH THE SAME ARE TO BE PAID, dated January 16, 2025.

Attachment(s): Resolution Approving City Warrant Register Dated January 16, 2025

4. CITY COUNCIL MINUTES OF JANUARY 14, 2025 (REGULAR)

Recommendation: Staff recommends the City Council approve the regular City Council meeting minutes of January 14, 2025.

Attachment(s): Draft Regular Meeting Minutes of January 14, 2025

5. INVESTMENT REPORT - QUARTER ENDING DECEMBER 31, 2024

Recommendation: Staff recommends the City Council receive and accept the Investment Report for the quarter ending December 31, 2024.

Attachment(s): Quarterly Investment Report

6. ADOPTION OF A RESOLUTION AUTHORIZING THE CITY MANAGER TO EXECUTE AGREEMENTS TO TRANSFER ADMINISTRATION OF THE CITY'S PENSION SECTION 115 TRUST TO SHUSTER ADVISORY GROUP, LLC, TRANSFER THE TRUST'S ASSETS TO CHARLES SCHWAB TRUST BANK, AND TO NAME ALTA TRUST COMPANY AS DIRECTED TRUSTEE (FUNDING SOURCE: GENERAL FUND)

Recommendation: Staff recommends the City Council adopt A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, AUTHORIZING THE CITY MANAGER TO EXECUTE AGREEMENTS TO TRANSFER ADMINISTRATION OF THE CITY'S PENSION SECTION 115 TRUST TO SHUSTER ADVISORY GROUP, LLC, AND TO TRANSFER THE TRUST'S ASSETS TO CHARLES SCHWAB TRUST BANK AND TO NAME ALTA TRUST COMPANY AS DIRECTED TRUSTEE.

Attachment(s): Resolution to Execute Agreements to Transfer City's Pension Section 115 Trust

7. AWARD OF CONTRACT TO CCS FACILITY SERVICES, INC. FOR CUSTODIAL SERVICES AT CITY-OWNED BUILDINGS (FUNDING SOURCES: GENERAL FUND AND CEMETERY FUND)

Recommendation: Staff recommends the City Council:

- A. Award a contract to CCS Facility Services, Inc. for custodial services at City-owned buildings and authorize the City Manager to enter into a three-year agreement with two optional one-year extensions with CCS Facility Services, Inc. in an amount not to exceed \$269,786.76 per year, and authorize a contingency of \$10,000, for a total of \$279,786.76 annually, or \$1,398,933.80 during the maximum term of the agreement;
- B. Appropriate \$48,719.24 in 2024-25 and 2025-26 from the unassigned General Fund balance to fully fund the agreement for custodial services at City-owned buildings through June 30, 2026; and
- C. Appropriate \$20,219.52 in 2024-25 and 2025-26 from the unassigned Cemetery Fund balance to fully fund the agreement for custodial services at City-owned buildings through June 30, 2026.

PUBLIC HEARING

Public Hearings will not begin before 7:00 p.m.

8. COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM - APPROVAL OF THE 2025-2026 BUDGET (FUNDING SOURCE: COMMUNITY DEVELOPMENT BLOCK GRANT FUND)

Recommendation: Staff recommends the City Council approve the program budget for the 2025-2026 Community Development Block Grant programs as proposed and authorize staff to proportionately increase or decrease each program budget based on the final Community Development Block Grant allocation.

ORDINANCES - None

ADMINISTRATIVE ITEMS

9. UPDATE ON CITY COUNCIL PRIORITIES AND 2024-26 OBJECTIVES (FUNDING SOURCES: VARIOUS)

- Recommendation:** Staff recommends the City Council:
- A. Receive and file the update on the 2024-26 City Council Priorities and Objectives; and
 - B. Provide direction to staff regarding the bulk item collection program.

Attachment(s): Attachment - City Council Priorities and 2024-26 Objectives

10. UPDATES TO THE TREE POLICIES AND GUIDELINES MANUAL (FUNDING SOURCE: GENERAL FUND)

- Recommendation:** Staff recommends the City Council approve the Tree Policies and Guidelines Manual as presented.

Attachment(s): Current Tree Policies and Guidelines Manual
 Updated Tree Policies and Guidelines Manual
 Public Comment Log
 Additional Public Comment
 Goals and Objectives
 Excerpt from the Draft 12-18-24 Tree Committee Meeting Minutes
 Excerpt from the Draft 01-16-25 CHS Commission Meeting Minutes

CONTINUED PUBLIC COMMENT

This time is reserved for those persons who were unable to speak earlier in the agenda because of the 30-minute time restriction.

COMMISSIONS - no vacancies

ADJOURNMENT

THE NEXT REGULAR MEETING OF THE CLAREMONT CITY COUNCIL WILL BE HELD ON, FEBRUARY 11, 2025, AT 6:30 PM, IN THE CLAREMONT COUNCIL CHAMBER, 225 WEST SECOND STREET, CLAREMONT, CA 91711.

A LOOK AHEAD – Upcoming Meetings and Tentative Agenda Items

***Helen Renwick Library Program and Activities Update
 Resolution Approving City Warrant Register Dated January 30, 2025
 Draft January 28, 2025 Special and Regular City Council Meeting Minutes
 Permanent Local Housing Allocation Funding
 Tenant Protection Discussion***

IN COMPLIANCE WITH THE AMERICANS WITH DISABILITIES ACT OF 1990, THIS AGENDA WILL BE MADE AVAILABLE IN APPROPRIATE ALTERNATIVE FORMATS TO PERSONS WITH DISABILITIES. ANY PERSON WITH A DISABILITY WHO REQUIRES A MODIFICATION OR ACCOMMODATION IN ORDER TO PARTICIPATE IN A CITY MEETING SHOULD CONTACT THE CITY CLERK AT 909-399-5461 or 909-399-5463 "VOICE" OR 1-800-735-2929 "TT/TTY" AT LEAST THREE (3) WORKING DAYS PRIOR TO THE MEETING, IF POSSIBLE.

I, SHELLEY DESAUTELS, CITY CLERK OF THE CITY OF CLAREMONT, CALIFORNIA, HEREBY CERTIFY UNDER PENALTY OF PERJURY THAT THE FOREGOING AGENDA WAS POSTED AT CLAREMONT CITY HALL, 207 HARVARD AVENUE, ON JANUARY 23, 2025, PURSUANT TO GOVERNMENT CODE SECTION 54954.2.

POST THROUGH: January 29, 2025



Claremont City Council

Agenda Report

File #: 5418

Item No: 1.

TO: ADAM PIRRIE, CITY MANAGER
FROM: COREY CALAYCAY, MAYOR
JENNIFER STARK, VICE MAYOR
DATE: JANUARY 28, 2025

Reviewed by:
City Manager: AP

SUBJECT:

APPOINTMENT OF A COMMUNITY MEMBER TO THE TRI-CITY MENTAL HEALTH GOVERNING BOARD

SUMMARY

Since 1960, Tri-City Mental Health has been the public mental health authority and primary provider of outpatient services for residents of Claremont, La Verne and Pomona, providing high quality, culturally competent behavioral health care treatment, prevention, and education.

Following a restructuring in 2007, Tri-City Mental Health established a Governing Board composition of seven members. Four members are council members from each of the service cities, and three members of the Board are appointed by the city council of each of the three cities.

The term for sitting Claremont Community Member Ron Vera is set to expire January 31, 2025. After serving eight years, Mr. Vera does not wish to seek another term at this time.

Per City Council Resolution No. 2007-75, Community Members shall serve for two years, however the initial term shall be one calendar year.

Mayor Corey Calaycay and Vice Mayor Jennifer Stark hereby recommend the appointment of Sandra Grajeda to a one-year term beginning February 1, 2025.

RECOMMENDATION

The City Council Ad Hoc Nominating Committee recommends the City Council appoint Sandra Grajeda to the Tri-City Mental Health Governing Board for a term commencing February 1, 2025, and expiring on January 31, 2026.

ANALYSIS

One of the principal sources of mental health services and support for individuals and families in Claremont, La Verne and Pomona has been the Tri-City Mental Health Center, through a Joint Powers Agreement (JPA).

Following a restructuring in 2007, the revised JPA set the composition of the Governing Board to consist of four council members from the three member cities - one from La Verne, one from Claremont, and two from Pomona. Another change in the JPA provided for the three member cities to each appoint one Community Member to serve on the Governing Board for a total of seven voting members.

The term for sitting Claremont Community Member Ron Vera is set to expire January 31, 2025. After serving eight years, Mr. Vera does not wish to seek reappointment at this time.

Per City Council Resolution No. 2007-75, Community Members shall serve for two years, however the initial term shall be one calendar year.

FINANCIAL REVIEW

The cost to prepare this report is estimated at \$376. This cost is in staff time and is included in the operating budget of the Administrative Services Department.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the General Plan and the 2024-26 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Corey Calaycay
Mayor

Jennifer Stark
Vice Mayor

Prepared by:

Shelley Desautels
City Clerk



Claremont City Council

Agenda Report

File #: 5421

Item No: 2.

TO: ADAM PIRRIE, CITY MANAGER

FROM: SHELLEY DESAUTELS, CITY CLERK

DATE: JANUARY 28, 2025

Reviewed by:

City Manager: AP

SUBJECT:

RESIGNATION OF TRAFFIC AND TRANSPORTATION COMMISSIONER BUFF BROWN

SUMMARY

Buff Brown was appointed to serve on the Traffic and Transportation Commission in September 2022. His term is set to expire on August 31, 2026; however, he will be moving out of Claremont and has therefore submitted his resignation from the Commission.

RECOMMENDATION

Staff recommends the City Council accept with regret the resignation of Buff Brown from the Traffic and Transportation Commission effective January 24, 2025.

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Prepared by:

Shelley Desautels
City Clerk

Jamie Costanza
Deputy City Clerk

Attachment:

Resignation of Traffic and Transportation Commissioner Buff Brown

Jamie Costanza

From: Buff Brown
Sent: Wednesday, January 22, 2025 1:59 PM
To: Maria Tipping; Brad Johnson; Adam Pirrie
Cc: Jamie Costanza; Shelley Desautels
Subject: Re: TTC Resignation

Maria el al,

I will be resigning from the TTC upon the adjournment of tomorrow's meeting as I will be moving out of Claremont at the end of January. Thank you for providing me this opportunity to serve my community. I will continue to provide support to the Claremont community regarding transportation safety.

Buff Brown

From: Buff Brown <bbrown@claremontca.gov>
Sent: Wednesday, January 22, 2025 1:55 PM
To: Maria Tipping <mtipping@claremontca.gov>; Brad Johnson <bjohnson@claremontca.gov>; Adam Pirrie <apirrie@claremontca.gov>
Cc: Jamie Costanza <jcostanza@claremontca.gov>; Shelley Desautels <sdesautels@claremontca.gov>
Subject: TTC Resignation

Maria el al,

I will be resigning from the TTC upon the adjournment of tomorrow's meeting as I will be moving out of Claremont at the end of January. Thank



Claremont City Council

Agenda Report

File #: 5409

Item No: 3.

TO: ADAM PIRRIE, CITY MANAGER

FROM: SHELLEY DESAUTELS, CITY CLERK

DATE: JANUARY 28, 2025

Reviewed by:

City Manager: AP

SUBJECT:

ADOPTION OF A RESOLUTION APPROVING THE CITY WARRANT REGISTER

RECOMMENDATION

Staff recommends the City Council adopt A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, ALLOWING CERTAIN CLAIMS AND DEMANDS AND SPECIFYING THE FUNDS OUT OF WHICH THE SAME ARE TO BE PAID, dated January 16, 2025.

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Shelley Desautels
City Clerk

Attachment:

Resolution Approving City Warrant Register Dated January 16, 2025

RESOLUTION NO. 2025-

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, ALLOWING CERTAIN CLAIMS AND DEMANDS AND SPECIFYING THE FUNDS OUT OF WHICH THE SAME ARE TO BE PAID

NOW THEREFORE, THE CLAREMONT CITY COUNCIL DOES HEREBY RESOLVE:

SECTION 1. That the list of claims and demands dated January 16, 2025, totaling \$3,318,516.20 has been audited as required by law.

SECTION 2. That warrant numbers 4694 through 4696, and 260481 through 260817 inclusive, are hereby allowed in the amounts and ordered paid out of the respective funds.

SECTION 3. That the Mayor shall sign this Resolution and the City Clerk shall attest and certify to the passage and adoption thereof.

PASSED, APPROVED, AND ADOPTED this 28th day of January, 2025.

Mayor, City of Claremont

ATTEST:

City Clerk, City of Claremont



Claremont City Council

Agenda Report

File #: 5410

Item No: 4.

TO: ADAM PIRRIE, CITY MANAGER

FROM: SHELLEY DESAUTELS, CITY CLERK

DATE: JANUARY 28, 2025

Reviewed by:

City Manager: AP

SUBJECT:

CITY COUNCIL MINUTES OF JANUARY 14, 2025 (REGULAR)

RECOMMENDATION

Staff recommends the City Council approve the regular City Council meeting minutes of January 14, 2025.

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Shelley Desautels
City Clerk

Prepared by:

Jamie Costanza
Deputy City Clerk

Attachment:

Draft Regular Meeting Minutes of January 14, 2025

**CLAREMONT CITY COUNCIL
MEETING MINUTES**

Tuesday, January 14, 2025 – 6:30 PM

Video Recording is Archived on the City Website

<https://www.claremontca.gov/Government/City-Council/Watch-a-Meeting>

CALL TO ORDER

Mayor Calaycay called the meeting to order at 6:31 PM.

PLEDGE OF ALLEGIANCE

MOMENT OF SILENCE – In honor of Hanne Ansell, Darleen Rota, Ruth Carolyn Duck, Former President Jimmy Carter, and victims of the recent wildfires.

ROLL CALL

PRESENT

COUNCILMEMBER: CALAYCAY, LEANO, MEDINA, REECE, STARK

ABSENT

COUNCILMEMBER: NONE

ALSO PRESENT

Adam Pirrie, City Manager; Alisha Patterson, City Attorney; Jeremy Swan, Director of Community Services; Brad Johnson, Director of Community Development; Jeremy Starkey, Director of Finance; Aaron Fate, Chief of Police; Melissa Vollaro, Director of Human Services; Shelley Desautels, City Clerk; Jamie Costanza, Deputy City Clerk

CLOSED SESSION REPORT

There was no closed session.

CEREMONIAL MATTERS, PRESENTATIONS, AND ANNOUNCEMENTS

The City Council recognized the Claremont Village Marketing Group for its sponsorship in hosting the 2024 Holiday Promenade and Tree Lighting Ceremony.

The City Council received a presentation on Sustainable Insurance Strategy implemented by Insurance Commissioner Ricardo Lara, presented by Julia Juarez, Deputy Commissioner.

Brian Vogelesang, Business Systems Analyst, and Cesar Serna, Information Technology Technician, were introduced.

The City Council received an update from Katherine Loeser, Claremont Helen Renwick Library Manager.

ANNOUNCEMENT OF FEDERAL HOLIDAYS/OBSERVANCES

New Year's Day, January 1, 2025

Birthday of Martin Luther King, Jr., January 20, 2025

Inauguration Day, January 20, 2025

MAYOR AND COUNCIL

Council Item

1. Announcement and Confirmation of Local and Regional Councilmember Appointments and Adoption of a Resolution Designating a Governing Board Member and Voting Alternate to the San Gabriel Valley Council of Governments Joint Powers Authority

This item starts at 1:01:39 in the archived video.

Mayor Calaycay highlighted the staff report.

Mayor Calaycay invited public comment.

City Clerk Desautels announced no written public comment had been received on this item.

There were no requests to speak.

Mayor Calaycay closed public comment.

Councilmember Stark moved to:

A. Confirm the various Councilmember appointments to local and regional committees, boards, and organizations; and

B. Adopted Resolution No. 2025-01, A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, DESIGNATING COUNCILMEMBER REECE GOVERNING BOARD MEMBER AND VICE MAYOR STARK VOTING ALTERNATE TO THE SAN GABRIEL VALLEY COUNCIL OF GOVERNMENTS JOINT POWERS AUTHORITY;

Seconded by Councilmember Leano, and carried on a roll call vote as follows:

AYES: Councilmember – Calaycay, Leano, Medina, Reece, Stark

NOES: Councilmember – None

Council Assignment Reports

This item starts at 1:04:50 in the archived video.

Councilmember Reece reported that he attended the California Contract Cities legislative tour and reported the Foothill Gold Line Construction Authority has now met its deadline and provided the remaining Gold Line project to Metro for completion.

Mayor Calaycay directed City staff to hold a community meeting with local utility companies to discuss various emergency efforts and responsibilities.

CITY MANAGER REPORT

This item starts at 1:09:42 in the archived video.

City Manager Pirrie reported the 2025 Greater Los Angeles Homeless Count has been postponed due to the recent wildfires and provided an update on the recent windstorm.

PUBLIC COMMENT

This item starts at 1:13:51 in the archived video.

Mayor Calaycay invited public comment.

City Clerk Desautels announced no written public comment had been received.

Jim Lawler, Claremont resident, expressed concern regarding the proposed parking garage for the Denley development and suggested the parking garage be moved to Oberlin instead of Cornell.

Richard Franco, Tri City Mental Health Community Navigator, shared upcoming events taking place at Tri City.

Buff Brown, Claremont resident, spoke in support of Claremont Tenants United and their requests of the City Council.

Unidentified speaker urged the City Council to create a rental registry and enforce existing laws like the requirement for an on-site manager at apartments when issues arise at the complex.

Alberto Romeo, Claremont resident and member of Claremont Tenants United, spoke in support of tenant protections.

Elaine Thompson, Claremont resident and member of Claremont Tenants United, expressed concern regarding rent increases and asked the City Council to adopt a rent stabilization ordinance.

Lydia Hernandez, Claremont Tenants United, asked the City Council to consider a rental registry and or rent stabilization ordinance and hopes to hear additional information regarding tenant protections at the upcoming City Council meeting.

Unidentified speaker spoke against a rental registry and rent stabilization ordinance as AB 1842 helps balance tenant stability and property owner rights.

Russ Binder, Claremont resident, spoke in support of the comments made by the previous speaker.

There were no other requests to speak.

Mayor Calaycay closed public comment.

CONSENT CALENDAR

This item starts at 1:38:22 in the archived video.

Mayor Calaycay invited public comment on the Consent Calendar.

City Clerk Desautels announced no written public comment had been received on the Consent Calendar.

There were no requests to speak.

Mayor Calaycay closed public comment.

Councilmember Stark moved to approve the Consent Calendar, seconded by Councilmember Leano, and carried on a vote as follows:

AYES: Councilmember – Calaycay, Leano, Medina, Reece, Stark
NOES: Councilmember – None

2. Adoption of Resolutions Approving the City Warrant Register
 - A. Adopted Resolution No. 2025-02, A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, ALLOWING CERTAIN CLAIMS AND DEMANDS AND SPECIFYING THE FUNDS OUT OF WHICH THE SAME ARE TO BE PAID, dated December 19, 2024; and
 - B. Adopted Resolution No. 2025-03, A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, ALLOWING CERTAIN CLAIMS AND DEMANDS AND SPECIFYING THE FUNDS OUT OF WHICH THE SAME ARE TO BE PAID, dated January 2, 2025.
3. City Council Minutes of December 10, 2024 (Regular)

Approved the regular City Council meeting minutes of December 10, 2024.
4. Award of Contracts to Data Climb, LLC and Tyler Technologies, Inc. for Implementation of the Enterprise Resource Planning (ERP) Financial Management Software Solution (Funding Source: General Fund, Technology Fund, and American Rescue Plan Act Fund)
 - A. Authorized the City Manager to enter into a contract with Data Climb, LLC in the amount of \$255,108 for project management support services related to the ERP Implementation Project;
 - B. Authorized the City Manager to enter into a contract with Tyler Technologies, Inc. in the amount of \$900,666 for a comprehensive Enterprise Resource Planning (ERP) Financial System; and
 - C. Appropriated \$96,000 from the unassigned General Fund balance to fund a portion of the ERP Implementation Project.
5. Approval of a Transfer Agreement Between the City of Claremont and the Los Angeles County Flood Control District, Agreement No. 2024MP16, Safe, Clean Water Program – Municipal Program (Funding Source: Measure W Fund)

Authorized the City Manager to execute a Transfer Agreement between the City of Claremont and the Los Angeles County Flood Control District, Agreement No. 2024MP16 for the Safe, Clean Water Program - Municipal Program (Measure W).
6. Authorization to Enter Into an Agreement with Tunnelworks Services Inc. for Storm Drain Repair Services (Funding Source: Drainage Fund)
 - A. Authorized the City Manager to execute an agreement with Tunnelworks Services, Inc. in the amount of \$44,600 for storm drain repairs; and
 - B. Appropriated \$44,600 from the Drainage Fund to fully fund the agreement.
7. Authorization to Amend the Existing Professional Services Agreement with TJKM Transportation Consultants to Expand the Scope of Work and Appropriate Additional Funds for the Development of a Citywide Street Sign Program (Funding Source: General Fund)
 - A. Authorized the City Manager to execute an amendment to the existing agreement with TJKM Transportation Consultants, increasing compensation by \$65,000 for a total contract amount of \$303,193.56; and
 - B. Appropriated \$65,000 from the unassigned General Fund balance to fund the agreement.

PUBLIC HEARING

8. Resolution Declaring Results of Majority Protest Proceedings to Renew the Claremont Tourism Business Improvement District (Funding Source: General Fund)

This item starts at 1:39:39 in the archived video.

Katie Wand, Deputy City Manager, highlighted the staff report.

City Clerk Desautels announced no written public comments had been received on this item.

Mayor Calaycay invited public comment and opened the public hearing.

There were no requests to speak; therefore, the public hearing was closed.

Councilmember Reece moved to adopt Resolution No. 2025-04, A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA DECLARING RESULTS OF MAJORITY PROTEST PROCEEDINGS AND RENEWING THE CLAREMONT TOURISM BUSINESS IMPROVEMENT DISTRICT (CTBID), also referred to as the Resolution of Formation, seconded by Councilmember Leano, and carried on a roll call vote as follows:

AYES: Councilmember – Calaycay, Leano, Medina, Reece, Stark
NOES: Councilmember – None

ORDINANCES – None

ADMINISTRATIVE ITEMS – None

ADJOURNMENT

Mayor Calaycay adjourned the regular meeting of the Claremont City Council at 8:16 PM. The next regular meeting of the Claremont City Council will be held on Tuesday, January 28, 2025, at 6:30 PM, in the Claremont Council Chamber.

Mayor

ATTEST:

Deputy City Clerk



Claremont City Council

Agenda Report

File #: 5412

Item No: 5.

TO: ADAM PIRRIE, CITY MANAGER

FROM: JEREMY STARKEY, FINANCE DIRECTOR

DATE: JANUARY 28, 2025

Reviewed by:

City Manager: AP

SUBJECT:

INVESTMENT REPORT - QUARTER ENDING DECEMBER 31, 2024

SUMMARY

As required by the City of Claremont Investment Policy and State law, a Quarterly Investment Report showing investment activity is to be presented to the City Council for its review and acceptance.

RECOMMENDATION

Staff recommends the City Council receive and accept the Investment Report for the quarter ending December 31, 2024.

ALTERNATIVE TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

- Request additional information.

FINANCIAL REVIEW

The City's investment portfolio is highly liquid, with the Local Agency Investment Fund (LAIF) and the Collateralized Savings funds available with 24-hour notification. The weighted average of days to maturity of all City investments is approximately 125 days.

As of December 31, 2024, the market value of City-held investments totaled \$49,151,279 of which \$23,538,621 (47.89 percent) was invested in LAIF; \$14,811,000 (30.13 percent) in Certificates of Deposit; \$10,158,114 (20.67 percent) in United States Treasury Bills; and \$643,544 (1.31 percent) in Collateralized Savings/Money Market Accounts. These investments fully comply with the City's current Investment Policy.

In addition to the above investments, the City established a Section 115 pension trust with Public Agency Retirement Services (PARS) to prefund pension costs. As of December 31, 2024, the market value of the trust totaled \$4,965,970.

The cost of staff time to research this issue, prepare documentation, and complete this report is estimated to be \$544. Funding is included in the operating budget of the Financial Services Department.

ANALYSIS

During the quarter ending December 31, 2024, the City maintained investments in Certificates of Deposit (CD), Collateralized Savings/Money Market Accounts, and in the Local Agency Investment Fund (LAIF), which is managed by the Treasurer's Office of the State of California. Investments in LAIF earned interest in the amount of \$278,712, CD interest amounted to \$167,425, United States Treasury Bills amounted to \$118,208, and collateralized savings/safekeeping account interest amounted to \$1,793.

There was an overall decrease of \$2,501,432 in the City's treasury investment portfolio from the previous quarter as shown in the Investment Report (Attachment). The decrease in invested funds was primarily the result of an additional contribution towards the unfunded liability of the City's CalPERS pension plans and a transfer to the PARS account. Later in the fiscal year, revenues received that exceed the amount required to maintain City operations will be deposited into the City's investment accounts to replenish their balances.

In March 2024, surplus funds of \$4,981,139 were invested in 6-month United States Treasury Bills in an effort to diversify the City's treasury investment portfolio. In August 2024, an additional \$4,894,520 was invested in 6-month Treasuries. In September 2024, upon maturity of those Treasuries purchased in March, \$5,092,152 in funds were reinvested in new 6-month Treasuries earning returns greater than LAIF. These investments fully comply with the City's current Investment Policy.

In 2021, the City Council authorized the establishment of a Section 115 pension trust with PARS for future discretionary contributions and/or disbursements to the City's pension obligations, while allowing local control of funds in the Trust. The City selected a moderately conservative portfolio at the Trust's inception. The current asset allocation policy is 30 percent in stocks, 65 percent in bonds and 5 percent in cash.

In 2021-22 the City Council approved a contribution of \$1 million to the Trust. In October 2022, the City Council authorized an additional contribution of \$1.5 million to the Trust. An additional \$1 million contribution was authorized by the City Council in October 2023 from 2022-23 surplus funds. These funds were deposited and are reflected in this Investment Report. Lastly, an additional \$1 million contribution was authorized by the City Council in October 2024 from 2023-24 surplus funds, which was transferred in January.

The market value of the Section 115 Trust totaled \$4,965,970 as of December 31, 2024, representing a loss of 1.78 percent in the last quarter. To provide benchmarks for the returns in the City's Section 115 Trust, the S&P 500 and Dow 30 stock indices had returns of 2.1 percent and 0.5 percent during the same time period, respectively.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it relates to the following City Planning Documents: Council Priorities, General Plan, and the 2024-26 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a paper copy, please contact the City Clerk's office.

Submitted by:

Jeremy Starkey
Finance Director

Prepared by:

Bibi Ameer
Accounting Supervisor

Attachment:

Quarterly Investment Report

**CITY OF CLAREMONT
INVESTMENT REPORT
OCTOBER 1, 2024 THROUGH DECEMBER 31, 2024**

ATTACHMENT

INVESTMENT DESCRIPTION	PURCHASE DATE	MATURITY DATE	BALANCES @ SEPTEMBER 30, 2024			ADDS/(SELLS)/ (MATURITIES)	BALANCES @ DECEMBER 31, 2024			INTEREST EARNED DURING QTR	YIELD	INTEREST RECEIVED DURING QTR
			PAR VALUE	ORIGINAL COST	MARKET VALUE*	DURING PERIOD @ COST	PAR VALUE	ORIGINAL COST	MARKET VALUE*			
CITY HELD INVESTMENTS												
BMO COLLATERALIZED SAVINGS ACCOUNT	N/A	N/A	124,556	124,556	124,556	518,988	643,544	643,544	643,544	1,477	2.88%	1,477
MULTI BANK SECURITIES SAFEKEEPING ACCOUNT	N/A	N/A	116,574	116,574	116,574	(116,574)	-	-	-	316	1.00%	316
CERTIFICATES OF DEPOSIT (MORGAN STANLEY BK NA MKT LKD INSTL)	04/29/22	10/29/24	250,000	250,000	250,000	(250,000)	-	-	-	-	2.70%	3,384
CERTIFICATES OF DEPOSIT (BANKERS BK MADISON WIS)	05/06/22	11/06/24	250,000	250,000	250,000	(250,000)	-	-	-	-	2.50%	1,045
CERTIFICATES OF DEPOSIT (NUMERICA CR UN SPOKANE VY WASH SH CTF)	11/04/22	11/04/24	250,000	250,000	250,000	(250,000)	-	-	-	-	4.85%	2,026
CERTIFICATES OF DEPOSIT (SPOKANE TEACHERS CR UN LIBERTY LAKE WASH SH CTF)	11/23/22	11/25/24	250,000	250,000	250,000	(250,000)	-	-	-	-	5.00%	2,158
CERTIFICATES OF DEPOSIT (BAXTER CR UN VERNON HILLS ILL SH CTF)	11/28/22	11/29/24	250,000	250,000	250,000	(250,000)	-	-	-	-	4.90%	2,081
CERTIFICATES OF DEPOSIT (CALIFORNIA CR UN GLENDALE CALIF SH CTF)	01/09/23	12/27/24	250,000	250,000	250,000	(250,000)	-	-	-	-	4.85%	6,079
CERTIFICATES OF DEPOSIT (FIRST FAMILY FED CR UN HENRYETTA OLKA SH CTF)	01/24/23	01/17/25	250,000	250,000	250,000		250,000	250,000	250,000	3,023	4.85%	-
CERTIFICATES OF DEPOSIT (FIRST TECHNOLOGY FED CR UN MTN VIEW CA SH CTF)	02/17/23	02/18/25	250,000	250,000	250,000		250,000	250,000	250,000	3,023	4.85%	3,023
CERTIFICATES OF DEPOSIT (TECHNOLOGY CR UN SAN JOSE CALIF SH CTF)	02/24/23	02/24/25	250,000	250,000	250,000		250,000	250,000	250,000	3,116	5.00%	3,116
CERTIFICATES OF DEPOSIT (WELLS FARGO BK NA SIOUX FALLS SD CTF)	03/17/23	03/17/25	250,000	250,000	250,000		250,000	250,000	250,000	3,272	5.25%	3,272
CERTIFICATES OF DEPOSIT (GLOBAL FED CR UN ANCHORAGE ALASKA SH CTF)	04/14/23	04/14/25	250,000	250,000	250,000		250,000	250,000	250,000	2,992	4.80%	2,992
CERTIFICATES OF DEPOSIT (BIBANK BATON ROUGE LA CTF)	05/19/23	05/19/25	250,000	250,000	250,000		250,000	250,000	250,000	3,054	4.90%	3,054
CERTIFICATES OF DEPOSIT (OAHU FED CR UN HONOLULU HAWAII SH CTF)	06/16/23	06/16/25	250,000	250,000	250,000		250,000	250,000	250,000	3,179	5.10%	3,179
CERTIFICATES OF DEPOSIT (CONNEXUS CR UN WAUSAU WIS SH CTF)	08/03/23	08/04/25	250,000	250,000	250,000		250,000	250,000	250,000	3,272	5.25%	3,272
CERTIFICATES OF DEPOSIT (AMERANT BK NATL ASSN CORAL GABLES FL CTF)	08/11/23	08/11/25	250,000	250,000	250,000		250,000	250,000	250,000	3,179	5.10%	-
CERTIFICATES OF DEPOSIT (MUTUAL FIRST FED CR UNION OMAHA NEB SH CTF)	08/03/23	08/04/25	250,000	250,000	250,000		250,000	250,000	250,000	3,241	5.20%	3,241
CERTIFICATES OF DEPOSIT (CHARTWAY FED CR UN VA BEACH VA SH CTF)	08/11/23	08/11/25	250,000	250,000	250,000		250,000	250,000	250,000	3,272	5.25%	3,272
CERTIFICATES OF DEPOSIT (VISIONS FED CR UN ENDWELL NEW YORK SH CTF)	09/29/23	09/29/25	245,000	245,000	245,000		245,000	245,000	245,000	3,451	5.65%	3,451
CERTIFICATES OF DEPOSIT (BMO BK NATL ASSN CHICAGO ILL CTF)	10/13/23	10/14/25	243,000	243,000	243,000		243,000	243,000	243,000	3,241	5.35%	6,518
CERTIFICATES OF DEPOSIT (CROSS RIV BK TEANECK NJ CTF)	10/31/23	10/31/25	243,000	243,000	243,000		243,000	243,000	243,000	3,302	5.45%	6,640
CERTIFICATES OF DEPOSIT (TAYLORSVILLE SVS BK SSB NORTH CAROLINE CTF)	11/03/23	11/03/25	248,000	248,000	248,000		248,000	248,000	248,000	3,308	5.35%	3,308
CERTIFICATES OF DEPOSIT (PINNACLE BK MARSHALL TOWN IOWA CTF)	11/28/23	11/28/25	248,000	248,000	248,000		248,000	248,000	248,000	3,122	5.05%	3,122
CERTIFICATES OF DEPOSIT (UBS BK USA SALT LAKE CITY UT CTF)	11/29/23	12/01/25	248,000	248,000	248,000		248,000	248,000	248,000	3,061	4.95%	3,061
CERTIFICATES OF DEPOSIT (TTCU FED CR UN TULSA OKLA SH CTF)	01/30/24	01/30/26	249,000	249,000	249,000		249,000	249,000	249,000	2,856	4.60%	2,856
CERTIFICATES OF DEPOSIT (BOGOTA SVGS BK TEANECK NJ CTF)	02/07/24	02/06/26	244,000	244,000	244,000		244,000	244,000	244,000	2,707	4.45%	-
CERTIFICATES OF DEPOSIT (UNIBANK LYNNWOOD CTF)	02/06/24	02/06/26	244,000	244,000	244,000		244,000	244,000	244,000	2,707	4.45%	-
CERTIFICATES OF DEPOSIT (OREGON CMNTY CR UN EUGENE ORE SH CTF)	02/09/24	02/09/26	249,000	249,000	249,000		249,000	249,000	249,000	2,794	4.50%	2,794
CERTIFICATES OF DEPOSIT (NEIGHBORS FCU BATON ROUGE LA SH CTF)	02/16/24	02/14/26	248,000	248,000	248,000		248,000	248,000	248,000	2,968	4.80%	2,968
CERTIFICATES OF DEPOSIT (DIRECT FED CR UN NEEDHAM MASS SH CTF)	02/21/24	02/23/26	249,000	249,000	249,000		249,000	249,000	249,000	2,856	4.60%	2,856
CERTIFICATES OF DEPOSIT (ENTERPRISE BK & TR CLAYTON MO CTF DEP)	03/08/24	03/09/26	245,000	245,000	245,000		245,000	245,000	245,000	2,932	4.80%	2,932
CERTIFICATES OF DEPOSIT (FIRST BANK PUERTO RICO SANTURCE INSSTL CTF)	03/18/24	03/18/26	244,000	244,000	244,000		244,000	244,000	244,000	2,890	4.75%	-
CERTIFICATES OF DEPOSIT (GENESEE REGL BK ROCHESTER NY CTF)	03/18/24	03/18/26	244,000	244,000	244,000		244,000	244,000	244,000	2,890	4.75%	-
CERTIFICATES OF DEPOSIT (FIRST NATL BK OF MICH KALAMAZOO CTF)	03/19/24	03/19/26	248,000	248,000	248,000		248,000	248,000	248,000	2,937	4.75%	2,937
CERTIFICATES OF DEPOSIT (NICOLET NATL BK GREENBAY WIS CTF)	03/19/24	03/19/26	248,000	248,000	248,000		248,000	248,000	248,000	2,937	4.75%	2,937
CERTIFICATES OF DEPOSIT (COMMUNITY WEST BK N A GOLETA CALIF CTF)	03/20/24	03/20/26	249,000	249,000	249,000		249,000	249,000	249,000	2,980	4.80%	2,980
CERTIFICATES OF DEPOSIT (BANK HAPOALIM B M NEW YORK BRH CTF)	03/20/24	03/20/26	244,000	244,000	244,000		244,000	244,000	244,000	2,920	4.80%	-
CERTIFICATES OF DEPOSIT (BANK AMER NA CHARLOTTE NC CTF)	03/21/24	03/23/26	244,000	244,000	244,000		244,000	244,000	244,000	2,920	4.80%	-
CERTIFICATES OF DEPOSIT (COMMUNIT BK DEL LEWES CTF)	03/26/24	03/26/26	244,000	244,000	244,000		244,000	244,000	244,000	2,920	4.80%	-
CERTIFICATES OF DEPOSIT (MVB BK INC FAIRMONT WEST VA CTF)	03/27/24	03/27/26	248,000	248,000	248,000		248,000	248,000	248,000	2,968	4.80%	2,968
CERTIFICATES OF DEPOSIT (VALLEY NATL BK PASSAIC NJ CTF)	04/02/24	04/02/26	244,000	244,000	244,000		244,000	244,000	244,000	2,920	4.80%	5,872
CERTIFICATES OF DEPOSIT (MORGAN STANLEY PRIVATE BK NATL ASSN PUR NY CTF)	04/10/24	04/10/26	244,000	244,000	244,000		244,000	244,000	244,000	2,920	4.80%	5,872
CERTIFICATES OF DEPOSIT (BMW BK NORTH AMER SALT LAKE CITY UTAH CTF)	04/19/24	04/20/26	244,000	244,000	244,000		244,000	244,000	244,000	2,980	4.90%	5,994
CERTIFICATES OF DEPOSIT (FLAGSTAR BK NATL ASSN HICKSVILLE NEW YORK CTF)	04/24/24	04/24/26	243,000	243,000	243,000		243,000	243,000	243,000	2,998	4.95%	6,031

**CITY OF CLAREMONT
INVESTMENT REPORT
OCTOBER 1, 2024 THROUGH DECEMBER 31, 2024**

INVESTMENT DESCRIPTION	PURCHASE DATE	MATURITY DATE	BALANCES @ SEPTEMBER 30, 2024			ADDS/(SELLS)/ (MATURITIES) DURING PERIOD @ COST	BALANCES @ DECEMBER 31, 2024			INTEREST EARNED DURING QTR	YIELD	INTEREST RECEIVED DURING QTR
			PAR VALUE	ORIGINAL COST	MARKET VALUE*		PAR VALUE	ORIGINAL COST	MARKET VALUE*			
CERTIFICATES OF DEPOSIT (MARINE FED CR UN JACKSONVILLE NC SH CTF)	04/30/24	04/30/26	248,000	248,000	248,000		248,000	248,000	248,000	3,092	5.00%	3,966
CERTIFICATES OF DEPOSIT (CITIBANK NATL ASSN SIOUX FALLS SD CTF)	05/03/24	05/04/26	243,000	243,000	243,000		243,000	243,000	243,000	3,029	5.00%	6,125
CERTIFICATES OF DEPOSIT (GOLDMAN SACHS BK USA NEW YORK CTF)	05/07/24	05/07/26	244,000	244,000	244,000		244,000	244,000	244,000	2,981	4.90%	6,027
CERTIFICATES OF DEPOSIT (FREEDOM BK OF VA FAIRFAX VA CTF)	05/17/24	05/18/26	248,000	248,000	248,000		248,000	248,000	248,000	2,999	4.85%	2,999
CERTIFICATES OF DEPOSIT (ISRAEL DISC BK NEW YORK CTF)	08/07/24	08/07/26	244,000	244,000	244,000		244,000	244,000	244,000	2,585	4.25%	-
CERTIFICATES OF DEPOSIT (BLUE RIDGE BK NATL ASSN MARTINSVILLE VA CTF)	08/13/24	08/13/26	244,000	244,000	244,000		244,000	244,000	244,000	2,707	4.45%	-
CERTIFICATES OF DEPOSIT (WORKERS FED CR UN LITTLEON MA SH CTF)	08/30/24	08/31/26	248,000	248,000	248,000		248,000	248,000	248,000	2,566	4.15%	1,692
CERTIFICATES OF DEPOSIT (FIRST GTY BK HAMMOND LA CTF)	09/06/24	03/06/26	244,000	244,000	244,000		244,000	244,000	244,000	2,525	4.15%	-
CERTIFICATES OF DEPOSIT (LENDINGCLUB BK NATL ASSN LEHI UTAH CTF)	09/09/24	09/09/25	239,000	239,000	239,000		239,000	239,000	239,000	2,562	4.30%	-
CERTIFICATES OF DEPOSIT (AMERICAN EXPRESS NATL BK BROKERED INTL CTF)	09/11/24	09/11/26	245,000	245,000	245,000		245,000	245,000	245,000	2,413	3.95%	-
CERTIFICATES OF DEPOSIT (CHARLES SCHWAB BK SSB WESTLAKE TEX CTF)	09/11/24	09/02/25	239,000	239,000	239,000		239,000	239,000	239,000	2,592	4.35%	-
CERTIFICATES OF DEPOSIT (RIVERWOOD BK BEMIDJI MINN CTF)	09/11/24	09/11/26	249,000	249,000	249,000		249,000	249,000	249,000	2,421	3.90%	2,421
CERTIFICATES OF DEPOSIT (Y-12 FED CR UN OAK RIDGE TENN SH CTF)	09/11/24	09/11/25	249,000	249,000	249,000		249,000	249,000	249,000	2,731	4.40%	2,731
CERTIFICATES OF DEPOSIT (CARTER BK & TR MARTINSVILLE VA CTF)	09/13/24	09/14/26	249,000	249,000	249,000		249,000	249,000	249,000	2,452	3.95%	2,452
CERTIFICATES OF DEPOSIT (FINANCIAL PARTNERS CR UN DOWNEY CA CTF)	09/13/24	09/12/25	249,000	249,000	249,000		249,000	249,000	249,000	2,700	4.35%	2,700
CERTIFICATES OF DEPOSIT (TRUSTONE FINL CR UN PLYMOUTH MINN SH CTF)	09/13/24	09/12/25	249,000	249,000	249,000		249,000	249,000	249,000	2,700	4.35%	2,700
CERTIFICATES OF DEPOSIT (VANTAGE WEST CR UN TUCSON ARIZ SH CTF)	09/13/24	09/14/26	249,000	249,000	249,000		249,000	249,000	249,000	2,545	4.10%	2,545
CERTIFICATES OF DEPOSIT (PREFERRED BK LOS ANGELES CALIF CTF)	09/19/24	09/21/26	249,000	249,000	249,000		249,000	249,000	249,000	2,421	3.90%	2,421
CERTIFICATES OF DEPOSIT (ALLY BK SANDY UTAH CTF)	09/19/24	09/21/26	245,000	245,000	245,000		245,000	245,000	245,000	2,413	3.95%	-
CERTIFICATES OF DEPOSIT (MEDALLION BK SALT LAKE CITY UTAH CTF)	11/08/24	11/09/24	-	-	-	249,000	249,000	249,000	249,000	1,410	3.90%	798
CERTIFICATES OF DEPOSIT (TRANSPORATION ALLIANCE BK INC OGDEN UTAH CTF)	11/08/24	11/06/26	-	-	-	249,000	249,000	249,000	249,000	1,010	4.00%	819
CERTIFICATES OF DEPOSIT (SAN FRANCISCO FED CR UN CALIF SH CTF)	11/27/24	11/27/26	-	-	-	249,000	249,000	249,000	249,000	1,537	4.25%	870
CERTIFICATES OF DEPOSIT (HOMELAND CR UN CHILLCOTHE OHIO CTF)	11/29/24	11/30/26	-	-	-	249,000	249,000	249,000	249,000	928	4.25%	870
UNITED STATES TREASURY BILLS	08/09/24	01/23/25	4,894,520	4,894,520	4,894,520	93,130	4,987,650	4,987,650	4,987,650	58,730	4.72%	-
UNITED STATES TREASURY BILLS	09/05/24	02/20/25	5,092,152	5,092,152	5,092,152	78,312	5,170,464	5,170,464	5,170,464	59,478	4.61%	-
LOCAL AGENCY INVESTMENT FUND (LAIF)	N/A	N/A	26,109,909	26,109,909	26,109,909	(2,571,288)	23,538,621	23,538,621	23,538,621	278,712	4.71%	278,712

TOTAL CITY HELD INVESTMENTS	45,657.00		\$ 51,652,711	\$ 51,652,711	\$ 51,652,711	\$ (2,501,432)	\$ 49,151,279	\$ 49,151,279	\$ 49,151,279	\$ 566,138		\$ 443,931
	53.00											

PARS-SECTION 115 PENSION TRUST	N/A	N/A	3,821,129	3,821,129	3,821,129	1,144,842	4,965,970	4,965,970	4,965,970	(78,086)	-1.78%	(78,086)
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CITY HELD INVESTMENT DATA:

<u>DISTRIBUTION OF CITY INVESTMENTS:</u>		<u>WEIGHTED AVERAGE DAYS TO MATURITY:</u>	
Local Agency Investment Fund (LAIF)	47.89%	BEGINNING OF QUARTER:	153 Days
Brokered Certificates of Deposit	30.13%	END OF QUARTER:	125 Days
Treasuries	20.67%		
Collateralized Savings/Safekeeping Accounts	1.31%		

* Investments are marked-to-market and reported at fair value at fiscal year end.



Claremont City Council

Agenda Report

File #: 5414

Item No: 6.

TO: ADAM PIRRIE, CITY MANAGER
FROM: JEREMY STARKEY, FINANCE DIRECTOR
DATE: JANUARY 28, 2025

Reviewed by:
City Manager: AP

SUBJECT:

ADOPTION OF A RESOLUTION AUTHORIZING THE CITY MANAGER TO EXECUTE AGREEMENTS TO TRANSFER ADMINISTRATION OF THE CITY'S PENSION SECTION 115 TRUST TO SHUSTER ADVISORY GROUP, LLC, TRANSFER THE TRUST'S ASSETS TO CHARLES SCHWAB TRUST BANK, AND TO NAME ALTA TRUST COMPANY AS DIRECTED TRUSTEE (FUNDING SOURCE: GENERAL FUND)

SUMMARY

Assets in a Section 115 Trust are irrevocably committed for the government function specified in the applicable trust agreement. In the City's case, the funds being set aside in the Section 115 Trust are to pre-fund the City's future pension obligations. Additionally, monies held in such trusts can be invested in accordance with the rules governing those trusts, which are different than the investment rules for the City's investment portfolio. Investment restrictions that apply to the investment portfolio of a City do not apply to the assets held in an irrevocable Section 115 Trust, thus allowing for more flexibility in the investment strategy. Setting aside funds in a Section 115 Trust can potentially earn a higher rate of return than funds invested within a city's investment policy guidelines.

The City has one Section 115 Trust for the purpose of funding pension obligations. Those funds are currently administered by the Public Agency Retirement Services ("PARS"), where assets are held by U.S. Bank and managed by PFM Asset Management LLC ("PFMAM"), a subsidiary of U.S. Bancorp Asset Management, Inc., which is a subsidiary of U.S. Bank. After a review of the current fee structure and fund line up, it was determined that savings could be achieved by transferring our plan administration and portfolio management to another provider. The recommended provider, Shuster Advisory Group, LLC, is the same firm that took over fiduciary responsibilities of the employee's 457 (b) deferred compensation plan in 2019.

RECOMMENDATION

Staff recommends the City Council adopt A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, AUTHORIZING THE CITY MANAGER TO EXECUTE AGREEMENTS TO TRANSFER ADMINISTRATION OF THE CITY'S PENSION SECTION 115 TRUST TO SHUSTER ADVISORY GROUP, LLC, AND TO TRANSFER THE TRUST'S ASSETS TO CHARLES SCHWAB TRUST BANK AND TO NAME ALTA TRUST COMPANY AS DIRECTED TRUSTEE.

ALTERNATIVE TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

- Request additional information from staff.

FINANCIAL REVIEW

Staff has analyzed Shuster's pricing model and the services to be provided in comparison to the current PARS program. The current fee schedule from the PARS program results in a 0.55 percent annualized fee, or \$22,242 (based on current balances), whereas the Shuster program would result in a 0.28 percent annualized fee, or \$11,323, which provides a 49 percent reduction in the expenses of the program. Assuming both programs earned an average 6 percent gross annual rate of return, the reduction of fees alone will result in an estimated savings of approximately \$174,500 over ten years, \$563,000 over twenty years, and \$1.4 million over thirty years. These results assume there are no fee changes and \$4.0 million of assets as of September 30, 2024. Future contributions by the City will only increase the comparative savings. With Shuster's ongoing oversight and personalized service model, staff expects comparable results for the Section 115 Trust to what were achieved for the 457(b) plan.

Lastly, Shuster will provide ten investment strategies that combine both active and passive (index) investment solutions to take advantage of the optimal mix of investments from both an investment return and cost perspective. If desired by the City, Shuster will also provide a custom portfolio at no additional cost.

The staff cost to prepare this report and administer this program is estimated at \$1,664 and is included in the operating budget of the Financial Services Department.

ANALYSIS

Background

On July 27, 2021, the City Council approved Resolution No. 2021-44 authorizing the establishment of an Internal Revenue Code Section 115 Irrevocable Trust with PARS to set aside funds for future payment of our unfunded actuarial liability (UAL). At that time, PARS partnered with U.S. Bank to serve as Trustee/Custodian and its subsidiary HighMark Capital Management to provide investment management services for the program. PFM Asset Management LLC ("PFMAM"), a subsidiary of U.S. Bank, took over investment management services effective January 1, 2024.

It has been three years since the initial creation of the Section 115 Trust in 2021, with PARS serving as the administrator. The City is not obligated to stay in the current trust arrangement with PARS, or

any provider for that matter. To the extent that cost savings for administering the trust can be achieved, that is additional money that will stay in the trust and earn interest over time. Based on available options, significant savings in administration costs are available by transferring the administration of the trust to the Shuster Advisory Group, LLC (“Shuster”). This transfer will also provide the City greater control of our funds through the customization Shuster’s program provides, more timely reporting, and potentially higher portfolio returns. As previously stated, Shuster is the same firm that took over fiduciary responsibilities of the employees’ 457(b) deferred compensation plan in 2019. The impact of their changes resulted in significant savings on the fees of employees, participants, and retirees’ accounts.

More specifically, in 2019, the City engaged Shuster as the retirement plan consultant and investment fiduciary for our 457(b) plan. Shuster issued a Request for Information (RFI) to our current recordkeeper and completed a comprehensive review of our plans, identifying that the fees for recordkeeping and administration were high and not transparent and that the quality of the investment menu needed improvement. Based on the information obtained through the RFI, Shuster subsequently issued a Request for Proposals (RFP) for administration and recordkeeping services for the Plans. The results of the RFP proved that the City’s administration and recordkeeping fees could significantly be reduced and the City could implement an open architecture investment menu and fee transparent platform benefiting participants. The City chose to remain with the current recordkeeper at a 93 percent reduction in recordkeeping costs, a higher crediting rate for the safety of the principal stable value solution, and an improved investment menu for plan participants.

Since the transition in August of 2019, participants in the Plans, as a whole, have saved approximately \$303,000 from the reduction in recordkeeping fees alone. An additional estimated \$42,000 has also been gained via the higher crediting rates on the guaranteed stable value solutions, contributing additional retirement savings for employees. The projected fee savings due to the fee reduction alone are estimated to be \$2.6 million over ten years, \$6.6 million over twenty years, and \$12.3 million over thirty years. These projected savings do not take into account any financial gains from improved investment options.

As of September 30, 2024, the City has \$4,044,057 in the pension trust account. A switch from the current administration of our Pension 115 trust account by PARS and U.S. Bank could result in a reduction in fees of approximately \$174,500 over ten years, \$563,000 over twenty years, and \$1.4 million over thirty years, assuming both programs earned an average 6 percent gross rate of return, a beginning value of \$4,044,057, no contributions or distributions, and no change in fee structures. Future contributions by the City will only increase the comparative savings.

Discussion

Public Agency Retirement Services (PARS)

The PARS option for OPEB and Pension Stabilization is the Public Agencies Post-Employment Benefits Trust, a multiple employer trust arrangement to which cities adopt the Trust to hold assets. It is important to note that although PARS provides services to public agencies, PARS is not a public agency or a public retirement system. PARS provides trust administration for the PARS Post-Retirement Healthcare Plan and the PARS Pension Rate Stabilization Program, both held in the same Public Agencies Post-Employment Benefits Trust. The advisor to the PARS investment portfolios is U.S. Bank, and PFM Asset Management LLC (“PFMAM”), a subsidiary of U.S. Bancorp Asset Management, Inc., which is a subsidiary of U.S. Bank, manages the portfolios. U.S. Bank also serves as Trustee for the multiple employer trust. The fees for PARS administrative services and U.S.

Bank/PFMAM trust and investment advisory services are separate fees, both a tiered structure based on assets. Based on our current trust balance, annualized PARS fees are \$22,242 per year. The PARS program provides five active investment strategies and another five portfolios of the same strategies, but as passive (index) strategies.

Shuster Advisory Group, LLC

Shuster Advisory Group, LLC (Shuster) is an independent investment advisory firm and fiduciary. They provide governmental and institutional retirement plan consulting services as well as private wealth management. Shuster is a SEC-Registered Investment Advisor with over \$7 billion in assets under management focusing on serving the unique needs of governmental agencies and special districts serving over 95 cities, agencies and public entities. Shuster serves as a fiduciary to plan investments and provides investment selection, monitoring, and management.

Shuster currently serves as the fiduciary investment advisor and plan consultant for our 457(b) Deferred Compensation Plan. The services provided by Shuster are unique with a low-cost, transparent structure and comprehensive and responsive services. Shuster entered the public retirement plan sector after analyzing the sector and realizing that cities and agencies were being over-charged and underserved for their retirement plans, directly impacting the supplemental retirement savings of the public employees. Hiring Shuster for these services resulted in a 93 percent reduction in the recordkeeping and administration fees and a 49 percent reduction in total plan costs, including recordkeeping and administration fees, fund expenses, and consultant fees, in addition to a significant improvement in the quality of the investments available in the retirement plan. Shuster has proven to be a responsive, analytical partner to the City.

Based on our current trust balance as of September 30, 2024, annualized Shuster fees will be \$11,323 per year. By transferring the City's Section 115 Trust to the Shuster Advisory Group, LLC, the City will save approximately \$11,000 per year, which when reinvested each year, will result in an estimated \$1.4 million in savings over thirty years. Additionally, Shuster will provide the City with daily online access to our trust account, timely customized reports, investment monitoring and advice, greater control over our funds, projected higher yields, and a significantly more interactive dialogue regarding our trust account investments.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, General Plan, and the 2024-26 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Jeremy Starkey
Finance Director

Attachment:

Resolution to Execute Agreements to Transfer City's Pension Section 115 Trust

RESOLUTION NO. 2025-

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CLAREMONT, CALIFORNIA, AUTHORIZING THE CITY MANAGER TO EXECUTE AGREEMENTS TO TRANSFER ADMINISTRATION OF THE CITY'S PENSION SECTION 115 TRUST TO SHUSTER ADVISORY GROUP, LLC, AND TO TRANSFER THE TRUST'S ASSETS TO CHARLES SCHWAB TRUST BANK AND TO NAME ALTA TRUST COMPANY AS DIRECTED TRUSTEE

WHEREAS, Shuster Advisory Group, LLC ("Shuster") has made available the Multiple Employer OPEB/Pension 115 Trust ("Trust") for the purpose of pre-funding pension obligations and/or OPEB obligations; and

WHEREAS, the City of Claremont ("City") is eligible to participate in a tax-exempt trust performing an essential governmental function within the meaning of Section 115 of the Internal Revenue Code, as amended, and the Regulations issued there under, and the Trust is a tax-exempt trust under the relevant statutory provisions of the State of California; and

WHEREAS, Alta Trust Company satisfies the Trustee requirements under IRC Section 115; and

WHEREAS, all qualified assets currently held in the City's Public Agency Retirement Services ("PARS") Public Agencies Post-Employment Benefits Trust are irrevocably dedicated to prefunding the City's pension obligations; and

WHEREAS, the City's adoption and operation of the Trust has no effect on any current or former employee's entitlement to post-employment benefits; and

WHEREAS, the terms and conditions of post-employment benefit entitlement, if any, are governed by contracts separate from and independent of the Trust; and

WHEREAS, the City Council has prudently set aside funds for pre-funding pension obligations; and

WHEREAS, the City's funding of the Trust does not, and is not intended to, create any new vested right to any benefit nor strengthen any existing vested right; and

WHEREAS, the City reserves the right to make contributions, if any, to the Trust.

NOW, THEREFORE, THE CLAREMONT CITY COUNCIL DOES HEREBY RESOLVE:

SECTION 1. The above recitals are true and correct and are incorporated herein.

SECTION 2. The City Council hereby adopts the Shuster Multiple Employer OPEB/Pension 115 Trust, effective January 28, 2025; and

SECTION 3. The City Council hereby authorizes the termination of the City of Claremont's participation in the PARS Public Agencies Post-Employment Benefits Trust Program, all services, administration, and investment contracts with PARS and US Bank, N.A. ("U.S. Bank"), including the services of U.S. Bank as Trustee; and

SECTION 4. The City Council hereby authorizes the appointment of Alta Trust Company as successor Trustee and Charles Schwab Trust Bank as custodian of the assets. The transfer of assets is contingent upon the acceptance of the successor Trustee and custodian; and

SECTION 5. The City Council certifies that the successor trust satisfies the requirements of Section 115 of the Internal Revenue Code and that all assets held by that trust shall qualify as "plan assets" that are irrevocably dedicated to the prefunding of pension obligations; and

SECTION 6. The City Council hereby authorizes the liquidation and transfer of all assets to Charles Schwab Trust Bank, as soon as administratively practicable; and

SECTION 7. Upon the complete transfer of assets on or around March 31, 2025, PARS is removed as trust administrator and U.S. Bank is removed as Trustee; and

SECTION 8. The City Council hereby appoints the City Manager, or his/her successor or his/her designee, as the City's Administrator for the Trust; and

SECTION 9. The City's Administrator is hereby authorized to execute the legal and administrative documents on behalf of the City and to take whatever additional actions are necessary to maintain the City's participation in the Trust and to maintain compliance with any relevant regulation issued or as may be issued; therefore, authorizing him/her to take whatever additional actions are required to administer the City's Trust.

SECTION 10. That said action was taken during a regular meeting of the City of Claremont City Council.

SECTION 11. The Mayor shall sign and the City Clerk shall certify to the passage and adoption of this Resolution and thereupon the same shall take effect and be in force.


PASSED, APPROVED AND ADOPTED this 28th day of January 2025.

Mayor, City of Claremont

ATTEST:

City Clerk, City of Claremont

APPROVED AS TO FORM:

|


City Attorney, City of Claremont



Claremont City Council

Agenda Report

File #: 5411

Item No: 7.

TO: ADAM PIRRIE, CITY MANAGER

FROM: JEREMY SWAN, COMMUNITY SERVICES DIRECTOR

DATE: JANUARY 28, 2025

Reviewed by:

City Manager: AP

SUBJECT:

AWARD OF CONTRACT TO CCS FACILITY SERVICES, INC. FOR CUSTODIAL SERVICES AT CITY-OWNED BUILDINGS (FUNDING SOURCES: GENERAL FUND AND CEMETERY FUND)

SUMMARY

The City outsources custodial services for all City-owned buildings. The City's current contract with Allied Universal Janitorial Services, LLC (Allied) expired in November 2024, with two optional one-year extensions remaining. Allied did not wish to extend their services under the current contract terms. Therefore, a Request for Proposals (RFP) for building custodial services was issued in November 2024. Seven bids were received, with the base bid costs ranging from \$234,370 to \$545,568 per year.

Staff recommends awarding a contract and entering into an agreement for building custodial services with CCS Facility Services, Inc., who was determined to have submitted the proposal with the best value.

RECOMMENDATION

Staff recommends the City Council:

- A. Award a contract to CCS Facility Services, Inc. for custodial services at City-owned buildings and authorize the City Manager to enter into a three-year agreement with two optional one-year extensions with CCS Facility Services, Inc. in an amount not to exceed \$269,786.76 per year, and authorize a contingency of \$10,000, for a total of \$279,786.76 annually, or \$1,398,933.80 during the maximum term of the agreement;
- B. Appropriate \$48,719.24 in 2024-25 and 2025-26 from the unassigned General Fund balance to fully fund the agreement for custodial services at City-owned buildings through June 30, 2026; and
- C. Appropriate \$20,219.52 in 2024-25 and 2025-26 from the unassigned Cemetery Fund balance to fully fund the agreement for custodial services at City-owned buildings through June 30, 2026.

ALTERNATIVE TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

- Delay awarding contract and request more information from staff.

FINANCIAL REVIEW

The budgeted amount for custodial services at City-owned buildings is currently \$210,848 annually. The proposed base contract with CCS Facility Services, Inc. is \$261,161.76. Staff recommends the approval of both alternates included in the RFP. Alternate #1 is sanitizing the judo mats at the Alexander Hughes Community Center daily, at an annual cost of \$3,000. Alternate #2 is the quarterly cleaning of all windows at City buildings at an annual cost of \$5,625. Additionally, staff proposes to include an annual contingency of \$10,000, for a total of \$279,786.76 annually. The contingency will only be used for the authorized addition of future services or special cleanings.

Appropriations of \$48,719.24 in 2024-25 and 2025-26 from the unassigned General Fund balance and \$20,219.52 in 2024-25 and 2025-26 from the unassigned Cemetery Fund balance are proposed to fully fund custodial services at City-owned buildings. The additional costs for building custodial services will be included in the City's operating budget beginning in 2026-27.

Description	Amount
Base Cost	\$ 261,161.76
Alternate #1 - Daily Mat Cleaning	\$ 3,000.00
Alternate #2 - Quarterly Window Cleaning	\$ 5,625.00
Contingency	\$ 10,000.00
Total Annual Contract Cost	\$ 279,786.76
Building Custodial Services Funding	
Adopted Budget	\$ 210,848.00
General Fund Appropriation	\$ 48,719.24
Cemetery Fund Appropriation	\$ 20,219.52
Total Funding	\$ 279,786.76

This project complies with all City purchasing guidelines. Bid and contract documents are available for review in the City Clerk's Office.

The costs to carry out this project, research the issue, prepare documentation, and complete this report are estimated to be \$3,901. These costs are in staff time allocated to the project and are included in the operating budget of the Community Services Department.

ANALYSIS

The City contracts for cleaning of all City-owned buildings. To ensure the highest quality of service, staff meets with the contractor on a regular basis to ensure custodial services are provided as specified in the contract. The City's current contractor is Allied Universal Janitorial Services, LLC. The initial term of the contract expired in November 2024, with two optional one-year extensions

remaining. Allied does not wish to extend services under the current contract terms. This is primarily due to increased costs and wages over the three-year period. Due to the late notice of termination, Allied has agreed to continue services on a month-to-month basis until a new contractor can commence services.

To ensure the City receives the best value for a contract, a Request for Proposals was issued in November 2024. Historically, the Village Parking Structure restrooms and elevators were included in the custodial services for buildings. However, the park restroom custodial agreement scope of work included the locking, unlocking, and cleaning of the Plaza furniture, and cleaning of the outside City Hall restrooms. Because the park restroom custodians are already in the area, staff included the Parking Structure restrooms and elevators in the new agreement for park restroom custodial services. A mandatory pre-bid meeting was held on November 20, 2024, with fifteen different custodial services providers in attendance. Seven bids were received at the end of the bid period. Base bid costs ranged from \$234,370 to \$545,568 per year.

Three bid alternates were included in the RFP for building custodial services. Bid Alternate #1 increased the frequency of sanitizing the mats at the Alexander Hughes Center used for recreation activities such as judo. Currently, the mats are sanitized monthly. The bid alternate increases the frequency of sanitizing the mats to a daily service. Bid Alternate #2 increases the frequency of window washing of all buildings from semi-annually to quarterly. Window washing includes cleaning the interior and exterior of all windows and screens. Bid Alternate #3 refers to the cleaning of the parking structure elevator windows. It should be noted that bidding on bid alternates was not required. Below is a chart with each contractor, base bid cost, and bid alternate amounts.

	PRIDE Industries	JJ Property Maint.	Verde Facilities Svcs.	Base Hill	Merchants Building Maint.	CCS Facility Svcs.	Guaranteed Janitorial Service, Inc.
Base Bid	\$371,801	\$242,854	\$296,783	\$272,760	\$234,370	\$261,162	\$545,568
Alternate #1	\$ 1,814	\$ 38,400	\$ -	\$ 9,000	\$ 6,240	\$ 3,000	\$ 9,000
Alternate #2	\$ 21,144	\$ 38,400	\$ -	\$ 17,404	\$ 12,780	\$ 5,625	\$ 30,000
Alternate #3	\$ 7,048	\$ 40,000	\$ -	\$ 2,000	\$ 782	\$ -	\$ 40,000
Total	\$401,807	\$359,654	\$296,783	\$301,164	\$254,172	\$269,787	\$624,568

Staff developed criteria by which to evaluate the bid proposal submissions. These criteria were detailed in the RFP for the bidders' information. State law does not require the City to award maintenance contracts solely based upon the lowest bid. Bid evaluation criteria are designed to ensure that the selected bidder is the "best value" for the community. Staff identified eight categories by which the bids would be evaluated. A panel of five internal staff evaluated the bid submittals, which consisted of three staff members from the Community Services Department, a representative from the Police Department, and a representative from Recreation and Human Services Department. Each bid was rated on a 1-5 point scale in each of the eight categories below, with 5 points being the highest score:

- Cost
- Responsiveness to Specifications
- References/Previous Performance
- Ability to Provide Service
- Consistency with Current Equipment Standards

- Unspecified Value-Added Offerings
- Implementation Schedule and Reports
- Hazard Communication Program

Merchants Building Maintenance and CCS Facility Services, Inc. were scored highest by the panel, and City staff interviewed both contractors. Following the interviews, staff felt CCS would be the best fit for the City. CCS has over thirty-five years of experience in custodial services and has integrated technology into their services to provide a system of checks and balances for quality assurance. They do not subcontract services, which allows for employee retention and seamless service. CCS has a long history of custodial services with municipalities including Fullerton, Chino, Rancho Cucamonga, and San Marcos.

Currently, two full-time City staff members conduct biweekly custodial services checks of each building. For timely response, these employees will address small deficiencies in building cleanliness and report larger deficiencies to the Supervisor. Approximately 600 hours annually in staff time is spent overseeing custodial issues that could be spent on higher level maintenance issues. The Supervisor then works with the contractor to address larger concerns, which takes another approximately 200 hours annually.

Although CCS is not the lowest bidder, City staff believes they can fulfill the requirements of the contract with the highest quality of service. Staff recommends awarding a contract to CCS Facility Services, Inc., including Bid Alternates #1 and #2 for a total of \$279,786.76 annually.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, Sustainable City Plan, Economic Sustainability Plan, General Plan, and the 2024-26 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Jeremy Swan
Community Services Director

Prepared by:

Cari Dillman
Community Services Manager



Claremont City Council

Agenda Report

File #: 5408

Item No: 8.

TO: ADAM PIRRIE, CITY MANAGER

FROM: BRAD JOHNSON, COMMUNITY DEVELOPMENT DIRECTOR

DATE: JANUARY 28, 2025

Reviewed by:

City Manager: AP

SUBJECT:

COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM - APPROVAL OF THE 2025-2026 BUDGET (FUNDING SOURCE: COMMUNITY DEVELOPMENT BLOCK GRANT FUND)

SUMMARY

The Community Development Block Grant (CDBG) Program is a federal program that provides funding to cities and counties to carry out programs and projects designed to benefit low-income persons. The CDBG allocation to Claremont for 2025-26 is estimated to be \$133,980 and is recommended to be divided between the three programs detailed in this report.

RECOMMENDATION

Staff recommends the City Council approve the program budget for the 2025-2026 Community Development Block Grant programs as proposed and authorize staff to proportionately increase or decrease each program budget based on the final Community Development Block Grant allocation.

ALTERNATIVES TO RECOMMENDATION

In addition to the recommendation, there are the following alternatives:

- A. Approve the proposed 2025-26 CDBG budget with changes.
- B. Request additional information.

FINANCIAL REVIEW

The estimated allocation of CDBG funding for 2025-26, in the amount of \$133,980, is proposed to fund the City's Housing Rehabilitation Program (\$83,883), Senior Case Management Program (\$20,097), and Job Creation and Business Incentive Program (\$30,000). These allocations are within the approved budget for the CDBG Fund for 2024-26.

The staff cost to prepare documentation and this report is estimated at \$500 and is included in the operating budget of the Community Development Department.

ANALYSIS

The CDBG Program is a Federal Block Grant Program that began in 1974 and provides funding to cities and counties to carry out programs and projects designed to benefit low-income persons. As a member of an Urban County Agreement, Claremont receives its CDBG funding from Los Angeles County. The County performs many of the administrative tasks required to comply with the Federal regulations of the CDBG program.

Proposed 2025-26 CDBG Budget

The County has not yet released the final budget allocation for 2025-26 but has released estimates. Since the budget is only an estimate at this time, staff recommends the City Council authorize staff to proportionately increase or decrease each program budget based on the final CDBG allocation.

The proposed budget is a continued commitment to the existing programs that have been previously funded with CDBG funds. The detailed breakdown of the budget is shown below.

Project/Program	Budget
Housing Rehabilitation Program	\$ 83,883
Senior Case Management Program	\$ 20,097
Job Creation & Business Incentive Program	\$ 30,000
Total	\$133,980

Housing Rehabilitation Program: \$83,883

The Housing Rehabilitation Program has been a part of Claremont's CDBG program for many years. The program is divided into two components, a rehabilitation loan and an energy efficiency improvement grant. The program's primary purpose is to provide funds to low-income homeowners who are not able to pay for needed maintenance, repairs, or energy efficiency improvements. The maximum amount for the loan program is \$20,000 per household, and the interest rate is zero percent. The loans are not required to be repaid until the homeowner sells the home or transfers the title. Energy efficiency improvements identified during a home energy efficiency review are qualified for a grant of up to \$5,000.

Senior Case Management: \$20,097

The Senior Case Management Program provides individual case management services to seniors over the age of 55, who reside in Claremont. Staff and the program consultant assist clients with a variety of age-related concerns, including Social Security, Medicare, Medical, SSI, HMO's, and long-term care, by providing information, referrals, and on-going case management. Clients receive one-on-one interaction to ensure comfort and confidentiality.

The Senior Case Management Program also serves as a gateway to a number of other social service programs that are offered by the Claremont Senior Program, such as the Nutrition Program, Phone Assurance Line, and various support groups. The program serves an average of eighty ongoing

cases that require individualized assistance. Additionally, the program provides support to over 1,900 individuals with one-time inquiries for information and referral assistance. The program provides twenty hours of support to the community each week with regular on-site office hours at the Joslyn Center, Monday through Thursday, 9:00 AM to 2:00 PM. Participation in this program has been consistent. Los Angeles County Development Authority (LACDA) CDBG guidelines limit funding for public service programs to a maximum of fifteen percent of total CDBG allocations. As the annual CDBG allocation has continuously been reduced, the budget for the Senior Case Management Program has been adjusted correspondingly. As a result, the City's General Fund must subsidize the difference between the Senior Case Management program cost and the CDBG allocation in 2025-26.

Job Creation and Business Incentive Program: \$30,000

In September 2009, the City Council approved the Job Creation and Business Incentive Program, which provides assistance to new or expanding businesses in the form of forgivable loans. In exchange, the assisted business must create one permanent, full-time equivalent (FTE) income-eligible position per every \$25,000 in funding, in which the hired employee must be from an extremely low- to moderate-income household. The City Council has approved thirteen loan requests since the adoption of this program. With the elimination of the Claremont Redevelopment Agency, this program represents the only ongoing source of funding currently available for economic development, and therefore, staff recommends this program be continued into 2025-26.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, Sustainable City Plan, General Plan, 2024-26 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Brad Johnson
Community Development Director

Prepared by:

Alex Cousins
Senior Management Analyst



Claremont City Council

Agenda Report

File #: 5393

Item No: 9.

TO: CITY COUNCIL

FROM: ADAM PIRRIE, CITY MANAGER

DATE: JANUARY 28, 2025

Reviewed by:

City Manager: AP

SUBJECT:

UPDATE ON CITY COUNCIL PRIORITIES AND 2024-26 OBJECTIVES (FUNDING SOURCES: VARIOUS)

SUMMARY

After resident requests to conduct a more robust priorities setting process with community input prior to the development of the 2024-26 Budget, staff engaged the Meorando Group to facilitate a City Council Priorities process. The process included a community survey, three community focus groups, and a City Council workshop.

At the workshop, the City Council reaffirmed the seven existing priorities, which had been previously approved in April 2022. In addition to the seven long-term priorities, the City Council identified 27 objectives that include policies, projects, and programs that staff will work on during the 2024-26 budget cycle.

The 2024-26 City Council Priorities and Objectives were approved by the City Council at its April 23, 2024 meeting. At that time, the City Council also directed staff to provide biannual updates in January and July of each fiscal year. The attached City Council Priorities Update reflects the current status of the City Council Priorities and Objectives.

Additionally, at the City Council meeting on October 22, 2024, the City Council requested that as part of this update, staff return with information on the City's current fees/policies regarding bulk item pick-ups of refuse for homeowners and for tenants residing at multi-family properties. That information is provided in this report, and staff is seeking direction on how the City Council would like to move forward.

RECOMMENDATION

Staff recommends the City Council:

- A. Receive and file the update on the 2024-26 City Council Priorities and Objectives; and
- B. Provide direction to staff regarding the bulk item collection program.

ALTERNATIVES TO RECOMMENDATION

In addition to the recommendation, there are the following alternatives:

- A. Request additional information from staff.
- B. Take no action.

FINANCIAL REVIEW

The process of updating City Council Priorities was intended to inform the development of the 2024-26 City Budget. In many cases, objectives identified by the City Council required the allocation of funding and/or resources through the budget development process. Accordingly, the financial impacts related to the 2024-26 Council Priorities and Objectives have been accounted for in the City's 2024-26 Budget.

The cost to prepare this report is estimated at \$4,000 and is included in the Administrative Services and Community Services Departments' operating budgets.

ANALYSIS

2024-26 Priorities and Objectives

In November 2023, the City began a public engagement process to gather community feedback on City Council Priorities. The City conducted a community survey that asked participants for their opinions on City programs and services, priorities for the City Council, and suggestions for improving City operations and programs. Additionally, the City hired Patrick Ibarra of the Mejorando Group to facilitate three community focus group meetings (held in December 2023 and January 2024) and a City Council Priorities Workshop, which was held on January 27, 2024.

At the workshop, the City Council reaffirmed the seven existing priorities, which had been formally approved in April 2022:

- Preserve Our Natural, Cultural and Historic Resources
- Maintain Financial Stability
- Invest in the Maintenance and Improvement of Our Infrastructure
- Ensure the Safety of Our Community Through Community-Based Policing and Emergency Preparedness
- Increase Livability in Our Neighborhoods and Expand Opportunities for Our Businesses
- Promote Community Engagement Through Transparency and Communication

- Develop Anti-Racist and Anti-Discrimination Policies and Plan to Achieve Community and Organizational Diversity, Equity, and Inclusion

The City Council also requested additional information on several work plan items or “objectives” that it would like to further consider, all of which the City Council provided additional direction on during its March 12, 2024 regular meeting. Based on the direction that has been provided, at its meeting on April 23, 2024, the City Council approved the 2024-26 City Council Priorities and Objectives document, which informed the Budget development process for 2024-26 (July 1, 2024, through June 30, 2026). At that time, the City Council also directed staff to provide biannual updates in January and July of each fiscal year.

The City Council Priorities Update (Attachment) reflects the current status of the City Council Priorities and Objectives.

Sanitation Fee Follow-Up

At the October 22, 2024 City Council meeting, the City Council requested that as part of this update, staff return with information on the City’s current fees/policies regarding bulk item pick-ups of refuse for multi-family properties.

Current Program and Rates

The City offers distinct programs and rate structures for single-family residential customers and multi-family accounts. The current rates and program structure for single-family residential and multi-family accounts are as follows:

Single-Family Residential

35-gallon	\$28.70 per month
64-gallon	\$34.30 per month
96-gallon	\$43.75 per month

Single-family residential rates are determined based upon the size of the trash container. In addition to trash, organic waste, and recycling, single-family residential rates also include up to three bulky item loads per calendar year. Sanitation staff tracks how many loads each account has utilized during the calendar year. Pick-ups that are not utilized do not carry over to the following year and no bill credit is available if the service is not utilized. On average, the City picks up approximately 3,200 bulky item loads per year. Staff estimates that approximately 12 percent of available bulky item loads are utilized in any given year. Given this consistent level of demand, the Sanitation Division is staffed to provide this level of service.

Once an accountholder has utilized their three included loads, fees are charged for the pick-up of additional loads. Single-family residential customers pay \$36.89 for “on-schedule” pickups or \$44.29 for “off-schedule” pickups. On-schedule pickups are scheduled on the customers’ regular service day on a first-come, first-serve basis. Scheduling on the regular service day limits the geographic footprint and allows for more efficient routing and collection. Off-schedule pickups are scheduled on Fridays throughout the City, resulting in more staff time and vehicle mileage for collection; therefore, there is a higher fee.

Multi-Family Rates, Property Types, and Account Setup

Automated Containers	\$26.70 per unit per month
Bin Service	\$26.70 per unit per month

For multi-family properties, the property manager sets up a single sanitation service account to service all units within the community. The property manager is responsible for the account payments, although the property manager may recoup the costs through rent or HOA fees. Rates are billed at a fixed rate per unit. Like single-family residential service, multi-family rates include trash, organic waste, and recycling service.

Multi-family rates are set at a lower cost per unit than single-family residential rates - between \$2 and \$17.05 per month depending on the size of the trash container. With the lower fixed monthly cost, the multi-family rate does not include any bulky item pickups. Bulky item pickups can be scheduled by property owners, managers, or residents at a cost of \$44.29 per load. Payments for paid bulky items are made at the time of scheduling via cash, check or credit card and; therefore, do not affect the account billing.

The City of Claremont has approximately 176 “residential multi-family” accounts and 54 “corporate multi-family” accounts, with a total of approximately 3,360 units. The 176 “residential multi-family” accounts are typically duplexes, triplexes, and small communities. The 54 “corporate multi-family accounts” consist of both renter-occupied apartment communities and certain owner-occupied condo/townhome communities.

For all multi-family accounts, the property manager sets up a single account with the City that provides service to all units within the development. The property owner/manager designated on the account is responsible for the sanitation bill. Unresolved, unpaid sanitation bills can result in a lien being placed on the corresponding property, so only authorized individuals can make changes to the account. For example, tenants/residents cannot add trash containers or increase service levels; these changes must be requested by the property manager that is responsible for the monthly bill. Residents can schedule bulky item pick-ups and paid services, as payment is made at the time of booking and does not affect the sanitation bill.

Considerations

Tracking Challenges

If bulky items were provided to multi-family properties as part of their bundled trash rate, a tracking system would need to be developed to track usage. Staff currently tracks the number of loads each single-family residential customer has utilized within a calendar year and begins charging for pickups after the third load. This is possible because the City has customer accounts and billing records for each single-family property. Therefore, the City has the property address and owner information on file for eligibility verification and tracking.

Setting up a similar tracking system for multi-family properties presents several challenges. The City has records regarding the total number of multi-family units for billing purposes but does not have a breakdown of unit numbers (i.e. unit 100, 101, 102 etc.). Therefore, tracking usage by unit number is impractical and would require investing in a new database. Likewise, the City does not have access to resident information for multi-family units. The multi-family sanitation account only provides contact information for the property manager. The City does not have access to the names of individual

residents living in multi-family communities. Without unit or resident information, verifying program eligibility and tracking usage presents significant challenges. Developing a multi-family tracking database for 3,360 multi-family residents, including tracking resident turnover, would likely involve significant one-time setup and on-going maintenance costs, in addition to staff time.

Since unit and resident information is not currently available for multi-family communities, the City could consider providing a set number of bulky items to the property manager/ account holder. This would require that residents in multi-family communities contact the property manager to request to use a complimentary bulky item pickup, who would subsequently contact the City to arrange for service under the account. This setup could be problematic for multi-family communities that do not have on-site property management services. Similar to the City, the property manager may not have resident information to verify eligibility, particularly for large, owner-occupied HOAs. The property manager may also not have the administrative capacity to track bulky item usage and call in collection requests. Finally, when calling in collection requests on behalf of the residents, the property manager may not have access to information regarding the size, number, and type of bulky items that are being scheduled for pickup. For these reasons, having the property manager coordinate bulky item pickups on behalf of residents is not recommended.

Increased Program Costs and Lost Revenues

The 2024-25 budget includes \$18,000 in projected revenue associated with paid bulky item pickups. If bulky items were provided to multi-family customers at no additional cost, staff anticipates this revenue would decrease. This revenue goes to support current staffing and service levels. In addition, providing bulky item collection at no additional cost could result in increased demand. If demand were to increase, additional staff would be required to schedule and complete additional bulky item pickups. Disposal and hauling costs would also likely increase, but the amount is unknown at this time.

Staff anticipates that the above cost increases would require increased monthly fees to ensure cost recovery. The Sanitation Fund is a self-supporting enterprise fund where fees cover the full cost to provide service. Anticipated cost increases could be likely addressed by increasing the fixed monthly price for multi-family accounts to be consistent with the lowest rate for single-family residential accounts, resulting in a \$2 per unit per month increase.

Whether this service model is preferable versus the current model would depend largely on how many bulky items a multi-family community utilizes each year. If the community typically schedules many paid bulky items, a higher fixed monthly fee may be advantageous to the customer. If the community does not regularly utilize the paid bulky item program, the higher fixed monthly fee could result in added costs with negligible added service.

Low-Income Discount Alternative

As established above, the current single-family and multi-family programs differ in their offerings but are equitable in that single-family customers receive a slightly higher level of included service but also pay a higher fixed monthly cost. Despite the current structural equity, there may be concerns regarding low-income multi-family residents for whom the cost of paid bulky item pickups may present a financial burden. Implementing a program similar to the single-family residential program presents significant challenges as detailed above. As such, staff proposes as an alternative that the City Council consider directing staff to develop a subsidized bulky item collection program for income-qualified residents.

The City has an existing low-income discount for sanitation services. This discount applies to regular service fees. The City also offers discounted valet service for income-qualified and disabled residents that cannot bring their containers to the curb for service. The City could implement a similar, income-qualified program for multi-family residents for whom bulky item pickup fees are a barrier. This alternative could enable the City to assist low-income residents with making basic services accessible while maintaining existing, lower multi-family rates.

Options to Consider

In light of the above information, staff recommends that the City Council consider several options and provide direction to staff:

- Option 1
 - Direct staff to maintain the current program structure.
- Option 2
 - Direct staff to develop a multi-family bulky item collection program comparable to the existing single-family residential program; develop program guidelines; and implement rate changes to cover the anticipated program costs.
- Option 3
 - Direct staff to develop a subsidized bulky item program for income-eligible multi-family residents.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City’s strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, Sustainability Plan, Economic Sustainability Plan, General Plan, Youth and Family Master Plan, and the 2024-26 budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk’s Office.

Submitted by:

Adam Pirrie
City Manager

Prepared by:

Katie Wand
Deputy City Manager

Attachment:

City Council Priorities Update

CITY OF CLAREMONT CITY COUNCIL PRIORITIES & 2024-26 OBJECTIVES

(Revised December 2024)

Preserve Our Natural, Cultural, and Historic Resources

Council Task or Objective	Department	Status/ Action Taken (through January 2025)	Next Steps (February 2025 through June 2026)
Continue to support and fund Community Based Organizations (CBO).	Recreation & Human Services	CBO grant applications were open from July-August 2024 for the 2025 Funding Year. CBO funding recommendations were made by the Community & Human Services Commission on November 6, 2024 and approved by the City Council on November 26, 2024 for the 2025 Funding Year. A total of 29 grants were awarded. Staff administered the grant contracts with each of the organizations that have been awarded and facilitate the funding process.	<ul style="list-style-type: none"> Staff and the Community & Human Services Commission will complete the CBO site visits in May 2025. CBOs will submit their mid-year reports and invoicing for payment in June 2025, and their final reports and invoicing for payment in December 2025 for the 2025 Funding Year. CBO grant applications will be open from July-August 2025 for the 2026 Funding Year. CBO funding recommendations will be made by the Community & Human Services Commission and will be presented to the City Council for approval in November 2025 for the 2026 Funding Year.

			<ul style="list-style-type: none"> Staff will continue to support and fund CBOs as directed by the City Council.
<p>Continue to support the arts, including potential opportunities to identify a live performing arts space in Claremont.</p>	Administrative Services	<p>The Public Art Committee continues to work on acquiring new public artwork and maintaining its public art inventory. Staff is evaluating potential live theater venues, including Taylor Hall and the Laemmle Theatre.</p>	<p>The Public Art Committee will be selecting the final artist to complete a public art project in El Barrio Park at its meeting in March 2025. A third phase of the Utility Box Painting Project will go to the City Council in spring 2025.</p>
<p>Ensure that the City’s Sustainable City Plan, Urban Forest Management Plan, General Plan, Municipal Code, Tree Policies and Guidelines Manual; internal policies/procedures; and staff/contractor qualifications and instructions are all consistent with best urban forest practices and with one another, and are effective in preserving and expanding our City’s Urban Forest, both public and private.</p>	Community Services	<p>The draft Tree Policies and Guidelines Manual was approved by the Tree Committee on December 18, 2024, and by the Community and Human Services Commission on January 16, 2025. The Tree Committee and Community and Human Services Commission recommendation was to approve the revised draft Manual and forward to the City Council for final approval.</p>	<p>The City Council will review the revised draft Tree Policies and Guidelines Manual at the January 28, 2025 City Council meeting. Once the Tree Policies and Guidelines Manual update has been completed, the review of other documents will begin to evaluate them for consistency with one another, as well as urban forest best practices.</p>
<p>Focus on environmental, fiscal, and organizational sustainability, including the professional development and retention of City employees.</p>	All Departments	<ul style="list-style-type: none"> In October 2024, the City Council allocated \$1.78 million in General Fund surplus funds to the City’s Operating and Environmental Emergency Reserve, bringing 	<ul style="list-style-type: none"> Staff will continue to evaluate and recommend best practice financial policies in hopes of positively impacting the City’s fiscal sustainability.

		<p>its balance to 30% of estimated 2026-27 General Fund operating expenditures.</p> <ul style="list-style-type: none">• Staff developed a ten-year financial plan, which focuses on long-term financial sustainability.• The Sustainability Committee continues to meet regularly to monitor progress towards achieving the Claremont Sustainable City Plan.• The City secured multi-year employment contracts with all employee bargaining units apart from the Claremont Police Officers' Association (CPOA), whose contract expires in June 2025.	<ul style="list-style-type: none">• Staff resources will continue to be dedicated to the Sustainability Committee.• The City will begin contract negotiations with CPOA in early spring 2025.
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Maintain Financial Stability			
Council Task or Objective	Department	Status/ Action Taken	Next Steps
<p>Develop and maintain a ten-year financial plan, which focuses on long-term financial sustainability.</p> <ul style="list-style-type: none"> • Long Range Plan will be added to annual budget process and final budget document. • Focus will be on both revenues and expenditures in the General Fund. • Continue to evaluate and recommend best practice financial policies, including reserve balance requirements. 	<p>Financial Services</p>	<ul style="list-style-type: none"> • Staff developed the City’s first Long Range Financial Plan (LRFP) covering the ten-year period of 2025-2034. • City Council received and filed the LRFP at the September 24, 2024 Meeting. • Staff will provide annual updates to the City Council each fall. 	<ul style="list-style-type: none"> • Staff will continue to monitor revenue and expenditure activity and evaluate the assumptions for the General Fund. • An update to the LRFP will be provided in the fall of 2025.
<p>Continue to evaluate and secure revenue enhancement opportunities, such as the potential regulation of short-term rentals and cannabis.</p>	<p>Financial Services & Community Development</p>	<ul style="list-style-type: none"> • Short-Term Rentals (STR) <ul style="list-style-type: none"> ○ Conducted community survey to gather input on STR regulations. ○ Held two Planning Commission study sessions: the first to provide general direction for drafting a regulatory ordinance, and the second to review and provide feedback on the draft ordinance. 	<ul style="list-style-type: none"> • Short-Term Rentals (STR) <ul style="list-style-type: none"> ○ Finalize the ordinance based on previous feedback from the Planning Commission. ○ Present the ordinance to the Planning Commission for review in Q1 2025. ○ Prepare the ordinance and supporting materials for City Council consideration. • Cannabis

		<ul style="list-style-type: none"> • Cannabis <ul style="list-style-type: none"> ○ Prepared a draft ordinance allowing for a limited number of cannabis retail businesses. 	<ul style="list-style-type: none"> ○ After completing the STR ordinance, present the cannabis ordinance to the Planning Commission for review. ○ Incorporate feedback and prepare for City Council consideration by the end of 2025.
<p>Monitor options for funding, controlling, or reducing current and future pension costs, as well as unfunded liabilities.</p>	<p>Financial Services</p>	<p>In October 2024 the City Council allocated \$1.25 million from the 2023-24 General Fund Surplus, combined with \$600,000 already budgeted, for a combined \$1.85 million additional discretionary payment towards the City’s unfunded pension liability with CalPERS. At the same meeting, the City Council authorized an additional \$1.0 million deposit to the City’s Section 115 Pension Trust.</p>	<p>Continue to budget for additional discretionary payments to CalPERS and use one-time surplus funds when opportunities arise.</p>

Invest In The Maintenance And Improvement Of Our Infrastructure

Council Task or Objective	Department	Status/ Action Taken	Next Steps
Maintain cleanliness of business districts, parks, transportation facilities, public rights of way, street signs, public restrooms, and public spaces.	Community Services	Staff have been assigned to regularly clean, pressure wash, and monitor different locations within the City, focusing attention on the cleanliness of the Village. Staff contracted with a new Park Restroom Janitorial company to improve park restroom cleanliness.	Staff will continue to be assigned and clean the locations in and around business areas, evaluating these locations for enhanced cleaning as necessary.
Develop a Park Facilities Improvement Plan by December 31, 2024. The Plan will: (i) assess the age and condition of park facilities, (ii) prioritize park facility improvements, (iii) identify current and future sources of funding for proposed park facility improvement, and (iv) outline a public engagement process for the development of park facility improvement projects. Concurrent with the development of the Park Facilities Improvement Plan, staff will engage the community in the development of a proposal for the	Community Services	The City Council approved the Lewis Park playground design and contract on October 8, 2024.	<p>Construction for the Lewis Park playground began on January 22, 2025, with an estimated timeline of five weeks for completion of the installation of new equipment.</p> <p>The draft Park Facilities Improvement Plan will be available shortly for public review for 30 days once released. After the public comment period on the draft plan is complete, the plan will be reviewed by the Community and Human Services Commission and City Council for adoption.</p>

<p>improvement of the playground at Lewis Park.</p>			
<p>Explore options to relinquish ownership of the Blaisdell Ranch Preserve to the Blaisdell Ranch Homeowners Association.</p>	<p>Administrative Services</p>	<p>On October 8, 2024, the City Council received a report from the City Attorney regarding anticipated requirements to relinquish the Blaisdell Ranch Preserve to the Blaisdell Ranch Homeowners’ Association (HOA). The City Council directed staff to identify cost estimates for potentially relinquishing the City’s easement and to ensure that the Blaisdell Ranch HOA is aware of the process.</p>	<p>Staff has met with representatives from the Blaisdell Ranch HOA and provided an update on the steps necessary for the relinquishment to take place. The HOA board will discuss their options and communicate to the City whether they would like to proceed with the relinquishment. Staff anticipates that an update will be provided to the City Council on this matter during calendar year 2025.</p>
<p>Ensure availability of modern technology for businesses and residents, and pursue options to address the cell service issues in some geographical areas within Claremont.</p>	<p>Administrative Services</p>	<ul style="list-style-type: none"> • The City has implemented a scalable and secure network infrastructure to improve communication, enhance data accessibility, and boost operational efficiency across all departments. This will ultimately enable our staff to serve the public more effectively. • The Community Development Department is currently processing a formal request for a new cell tower at 1700 N Towne Avenue. The first proposal, which was a bell 	<ul style="list-style-type: none"> • Monitor network performance to identify issues and optimize the system's speed, reliability, and scalability. • Conduct regular security audits, penetration testing to maintain government regulations and compliance and ultimately ensure data security. • Continue work with cell service providers in hopes of addressing issues that are experienced in some geographical areas within Claremont.

		<p>tower, was denied at the Architectural Commission. The applicant is redesigning it to be a tree and at a lower height and will bring forward in the next few months.</p> <ul style="list-style-type: none">• Community Development is also working with a provider to construct a new tower at 550 E Base Line Road (behind Vons). This tower was approved a few years ago but not constructed. The provider is working with staff to make a few minor modifications to the design and hopes to construct the facility this year.• Community Development approved a minor modification to an existing tower on Auto Center Drive (south of Super King).• City staff has been working to identify a provider to install a cell site on or around the Wilderness Park parking lots, to improve coverage in the areas adjacent to the foothills.	
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		<ul style="list-style-type: none">• City staff has been working with a provider that has been looking at developing a new facility at Padua Avenue Park. Staff has provided supportive comments regarding the preferred design and location, and is currently awaiting a formal proposal from the provider.• All of these cell tower enhancements are intended to improve wireless communication infrastructure in the City.	
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Ensure the Safety of Our Community Through Community-Based Policing and Emergency Preparedness

Council Task or Objective	Department	Status/Action Taken	Next Steps
<p>Assess traffic calming measures including street infrastructure and design, as well as additional enforcement by the Police Department.</p>	<p>Police & Community Development</p>	<ul style="list-style-type: none"> The Police Department was awarded a grant from the California Office of Traffic Safety in the amount of \$140,000. The grant funds allow for additional enforcement in areas of the City based on primary collision factors as well as additional DUI enforcement. During this update period, 18 grant funded enforcement operations have been conducted. Mountain Avenue Complete Streets design has been substantially completed, to include traffic calming features. This item was presented to the Traffic 	<ul style="list-style-type: none"> Continue to conduct additional enforcement operations within the City as well as pursue future grant opportunities. SB1 Local Partnership grant application results are pending. Depending on the results, staff will continue to pursue funding for the construction of the Mountain Avenue Complete Streets Project. Finalize plans and initiate a competitive bid process for the construction of this project. Towne Avenue Complete Streets Project is being finalized with the completion of the punch list items.

		<p>and Transportation Commission. Since construction funding for complete streets projects is not available, staff have researched funding options and applied for the SB1 Local Partnership Program in November 2024, asking for \$7,626,790 to construct this project.</p> <ul style="list-style-type: none">• Russian Village Traffic Calming project design plans are being finalized. This item was presented to the Traffic and Transportation Commission.• Arrow Highway (Indian Hill to Cambridge) and Cambridge (Arrow Highway to Bonita Avenue) Complete Streets project, which includes the Arrow/Bucknell traffic signal design is moving forward with the SGVCOG taking the lead. Towne Avenue Complete Streets Project is being	
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		<p>finalized. The project includes traffic calming measures such as travel lane narrowing, Class II and Class IV bike lanes, green bike paint markings, including bike boxes, landscaping and entry monuments.</p>	
<p>Actively promote alternative uses of streets including bicycles, walking, and scooters, including:</p> <ul style="list-style-type: none"> • Identifying funding and resources to complete pending Capital Improvement Projects (i.e., South Indian Hill Blvd. and San Jose Ave.) • Developing a comprehensive Active Transportation Plan to prioritize projects and allocate funding citywide. 	<p>Community Development & Administrative Services</p>	<ul style="list-style-type: none"> • A Local Road Safety Plan (LRSP) was completed to identify priority locations impacted by collision patterns. This plan was completed in August 2024 with the purpose of creating funding eligibility for future safety grants. • Arrow Highway (Indian Hill to County Line) grant application submitted through the SGVCOG requesting up to \$6,000,000 for complete streets improvements. This grant was submitted in November 2024. • Indian Hill Boulevard and San Jose Corridors: A SS4A grant application was submitted in August 2024, 	<ul style="list-style-type: none"> • Use the LRSP to design priority projects to address safety issues resulting from collision patterns • Continue to work with the SGVCOG and the consultant on the preparation of the Arrow Highway Complete Streets Project plans, to be completed by the end of 2025. • Indian Hill/San Jose corridors: continue to pursue funds for the preparation of this plan. Staff is proposing to re-apply for the SS4A planning grant this spring, based on feedback received from SS4A representatives. • Rule 20A Arrow Highway: The LA County Board of Supervisors tentatively scheduled to approve the \$1,000,000 funding allocation in January 2025. Once approved,

		<p>seeking \$1,400,000 in grant funds to prepare a complementary safety plan for these corridors. Unfortunately, this grant was not funded. Staff requested to debrief with grant administrators to get feedback on the application, receiving encouraging feedback to re-apply.</p> <ul style="list-style-type: none"> • Rule 20 Arrow Highway undergrounding of utilities from Indian Hill to Villanova to improve accessibility. LA County has committed to allocate additional \$1,000,000 in Rule 20 funds to supplement the City’s allocation. • Active Transportation Plan (ATP): staff is currently reviewing proposed ALTA Planning scope of work to move forward the preparation of the Plan. 	<p>staff will work with Edison on the development of the project.</p> <ul style="list-style-type: none"> • Active Transportation Plan: finalize the scope and take an item to the City Council for contract consideration and award.
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<p>Continue to pursue improvements to the existing Police Department facility.</p>	<p>Police & Administrative Services</p>	<ul style="list-style-type: none"> • Dunbar Architecture finalized the Women’s Locker Room Project design and submitted to the City for plan check review. • Risha Engineering started work on Phase 2A of the Seismic Retrofit Project and submitted a draft report to the City in December for review. • The Dispatch Center upgrade has continued with the installation of new hardware and software. • Wiring work for the solar panel project has been on-going. • The entire station was re-keyed including installing ADA compliant door handles. • Design of an ADA compliant parking stall to the front of the station is on-going. 	<ul style="list-style-type: none"> • When the plans for the Women’s Locker Room are approved, staff will prepare a bid package to be released. Staff will also solicit proposals for project management services. • Staff will review the Phase 2A draft report and when finalized, Risha will move on with the remaining action items to be completed as part of Phase 2A. Staff will solicit a proposal from Risha for Phase 2B. • Complete the Dispatch Center Upgrade. • Complete the solar project. • Complete the design of the ADA compliant parking stall.
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<p>Proactively address criminal activity related to human trafficking and connect any victims to appropriate resources.</p>	<p>Police</p>	<p>The Police Department conducted two prostitution/human trafficking operations during this update period. During these operations, 17 arrests were made for soliciting commercial sex acts and two additional arrests were made for human trafficking. Staff from the Police Department attended the National Human Trafficking Training conference hosted in Chandler, Arizona.</p>	<p>Continue undercover operations related to prostitution/human trafficking. Develop more comprehensive resources to aid victims of human trafficking.</p>
<p>Continue to evaluate nuisance activity occurring in and around local motels and use a collaborative approach to abate the activity via the City’s Interdepartmental Team.</p>	<p>Police, Administrative Services & Community Development</p>	<p>The City’s Interdepartmental Team (CIT) continues to meet regularly and publish updates regarding hotel and motel activity.</p>	<p>The second Annual Hotel/Motel Ordinance Update will be presented to the City Council in February 2025.</p>
<p>Evaluate safety improvements to Claremont Hills Wilderness Park; invest in a feasibility plan and potential funding sources to enhance available parking; and pursue access to Evey Canyon.</p>	<p>Recreation & Human Services</p>	<p>Staff have met with an engineering firm to identify needs and develop a scope of work for a consultant to conduct the feasibility study</p>	<p>Staff will utilize the engineer’s scope of work to develop a Request for Proposal (RFP) to obtain bids from qualified consultants.</p>
<p>Continue to evaluate citywide emergency preparedness and response efforts.</p>	<p>All Departments</p>	<p>The City has activated its Emergency Operations Center (EOC) when faced with the need for potential emergency response, such as during the Bridge Fire and the January 2025 winds/fires</p>	<p>Staff will continue to evaluate citywide emergency preparedness and response efforts, including EOC activations when warranted, staff training, and informing the public of best practices regarding emergency preparedness. Staff will also</p>

		<p>throughout Los Angeles county. Staff also utilizes multiple communication tools to share real-time information with the public before, during, and after a potential emergency.</p>	<p>coordinate a public workshop on its emergency preparedness protocols, including coordination with first responder agencies and utility companies. The workshop is tentatively scheduled for March 2025.</p>
<p>Work directly with surrounding agencies, including task forces, to address criminal issues impacting the shared local areas, and consider assigning a Police Officer to these task forces.</p>	<p>Police</p>	<ul style="list-style-type: none"> • The Police Department conducted two prostitution/human trafficking operations during this update period. During these operations, 17 arrests were made for soliciting commercial sex acts and two additional arrests were made for human trafficking. The operations were conducted near shared jurisdictional boundaries and involved personnel from surrounding law enforcement agencies. • Members of the Police Department participated in a regional Internet Crimes Against Children task force operation. The operation 	<p>Continue to work directly with surrounding agencies, including task forces, to address criminal issues impacting the shared local areas.</p>

		<p>netted 201 arrests over a two-week period.</p> <ul style="list-style-type: none">• Members of the Police Department worked with Upland Police Department in an operation targeting massage businesses that were suspected to be engaged in criminal activity. During the operation, inspections were conducted at 12 businesses and 10 arrests were made.	
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Increase Livability In Our Neighborhoods And Expand Opportunities For Our Businesses

Council Task or Objective	Department	Status/Action Taken	Next Steps
<p>Continue to explore and promote resources for people experiencing housing instability and/or displacement, including:</p> <ul style="list-style-type: none"> • The feasibility of implementing a Claremont Rental Registry and rent stabilization; • Provide rental assistance/incentives to eligible property owners and tenants through the Claremont Temporary Housing Stabilization and Relocation Program; • Consider adding self-governing “anti-harassment” language to the City’s Just Cause Eviction Ordinance; and • Consider funding “dispute resolution” and/or “mediation” services to address landlord/tenant disputes. 	<p>Administrative Services/ Recreation & Human Services</p>	<p>Staff is preparing an item for the February 11, 2025 City Council meeting to receive direction on the following matters:</p> <ul style="list-style-type: none"> • The feasibility of implementing a Claremont Rental Registry and enacting rent stabilization; • Consider adding self-governing “anti-harassment” language to the City’s Just Cause Eviction Ordinance; and • Consider funding “dispute resolution” and/or “mediation” services to address landlord/tenant disputes. <p>As of December 31, 2024, Program Cycle 2 (7/1/24 through 6/30/25), the City has provided rental assistance to over 185 Claremont households.</p>	<p>Staff will implement direction provided by City Council during its February 11, 2025 meeting.</p> <p>Staff will continue to process applications through the Claremont Temporary Housing Stabilization and Relocation Program until funding is exhausted. Applications for Program Cycle 3 (7/1/25 through 6/30/26) will open in spring 2025.</p>

<p>Undertake deliberate planning for the development of the Foothill Boulevard and Monte Vista Avenue area, and work with Los Angeles County or the City of Upland to promptly adopt the most recent Cable Airport Land Use Compatibility Plan and incorporate it into our General Plan and Municipal Code.</p>	<p>Community Development</p>	<p>In December 2024, the City processed a subdivision map to split the Armstrong Nursery site into a separate parcel and purchased the remaining 6.7-acre vacant area under the ownership of Clare Properties, excluding the 3-acre parcel located in the City of Upland. The staff has stayed in regular communication with the County of Los Angeles on the work necessary to adopt the most recent Cable Airport Land Use Compatibility Plan (ALUCP). The ALUCP plan project was recently re-assigned to another LA County Planning Division due to impacted workloads in the ALUCP Division.</p>	<p>Now that the City of Claremont holds ownership of the majority of the land area near the City’s entrance, the City will have more control over planning efforts rather than relying on private property ownership to propose additional projects. The City will continue to coordinate with the City of Upland as the corner parcel is a key component of this planning effort. The City will assist LA County as they move forward with the Cable Airport ALUCP adoption process and stakeholder outreach. Planning for the future use of the site will not take place until LA County has updated their Airport Land Use Compatibility Plan.</p>
<p>Conduct outreach to businesses throughout the city with attention given to businesses outside the Village.</p>	<p>Administrative Services</p>	<p>Staff maintains an email notification system for all businesses with a business license in Claremont and sends information and bulletins with information on news and opportunities related to businesses. City staff has been actively working with businesses in the southern section of Claremont to address issues of concern for the businesses and neighborhood.</p>	<p>Staff will continue to reach out to all businesses through existing communication channels and through the new Gov Delivery digital communication system launching in February.</p>

<p>Consider options to repurpose and provide affordable housing, and engage in discussions with The Claremont Colleges, Claremont Unified School District, and other regional partners to explore the need for workforce housing.</p>	<p>Community Development</p>	<p>On September 10, 2024, the City received final state certification of its 6th Cycle Housing Element, which includes providing an adequate number of sites for all levels of housing affordability, as outlined in the City’s Regional Housing Needs Assessment. The staff has processed ministerial preliminary plan approvals for two new 100% affordable housing developments in the fourth quarter of 2024. The Mercy House development includes 74 units of veteran “head of household” rental units at Towne/Foothill. National Core includes 59 senior 62+ rental units at Bonita/Mountain. Both projects include some units set aside for permanent supportive housing (PSH). Staff have been performing Building and Engineering Division inspections for the 33-unit Larkin Place PSH development currently under construction adjacent to Larkin Park on Harrison Avenue. Staff has been in preliminary discussions with The Claremont Colleges Services, Inc. (TCCS) about the Colleges moving forward with master planning of multiple College</p>	<p>Staff will continue to implement the various housing-related programs outlined in the 6th Cycle Housing Element in a timely and effective manner, including submitting an annual progress report to the State. Staff will continue to reach out to the Claremont Colleges and CUSD to explore the need for workforce housing. Staff will continue to meet with the faith-based organizations in town to provide resources for organizations that desire to provide affordable housing on their faith-based properties. Staff will continue to work with affordable housing developers and property owners, submitting housing proposals and constructing new affordable housing units.</p>
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City Council Priorities & 2024-26 Objectives

		or TCCS-owned properties along Foothill Blvd and Indian Hill Blvd, which could include workforce housing. Staff had preliminary discussions with several faith-based organizations interested in developing affordable housing on their parcels.	
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Promote Community Engagement Through Transparency And Communication

Council Task or Objective	Department	Status Action/Taken	Next Steps
<p>Explore costs and feasibility of providing City communication/marketing materials in various languages.</p>	<p>Administrative Services</p>	<p>With the launching of the new City website, information is available in multiple languages on the web browser. Website visitors are able to select the language they prefer.</p>	<p>Staff will continue to provide information in multiple languages on the City’s website and on targeted mailers and flyers.</p>
<p>Utilize technology for communicating with the public.</p>	<p>Administrative Services</p>	<ul style="list-style-type: none"> • The City launched a new website and .GOV domain on December 12, 2024. The City also launched the community engagement website ClarmeontEngage.gov for residents to follow and provide input on City projects. The City also migrated its emergency alert system to Rave systems. • The City installed audiovisual equipment in the Council Chamber to enhance public engagement, improve accessibility, and ensure clearer communication, fostering transparency and greater civic participation. 	<ul style="list-style-type: none"> • Staff will be launching a new communication platform in February that allows for targeted notifications to residents through email and text. Staff is in the process of creating a short video series on the Council/Commission process. • Staff will continue to provide training and support to ensure everyone can fully utilize the upgraded equipment, enhancing meeting efficiency and interactivity with the public.

Help educate our community on “how to” participate in the public process.	Administrative Services	The City launched a new website on December 12, 2024 with pages dedicated to educating the public on participating in the government process and new forms to submit comments for public meetings.	Staff is in the process of creating a short video series on the Council/Commission process.

Develop Anti-Racist, Anti-Discrimination Policies And Plan To Achieve Community And Organizational Diversity, Equity And Inclusion

Council Task or Objective	Department	Status/Action Taken	Next Steps
Continue to work with CPS HR Consulting to conduct community involvement and outreach; DEI trainings for City employees and Councilmembers; and related consulting services.	Administrative Services	CPS HR experienced significant staff turnover in 2024, which delayed planned DEI training for City employees and Councilmembers. CPS HR is now fully staffed and will kick off its staff training curriculum in February 2025.	Councilmember training will be scheduled for spring 2025.



Claremont City Council

Agenda Report

File #: 5417

Item No: 10.

TO: ADAM PIRRIE, CITY MANAGER

FROM: JEREMY SWAN, COMMUNITY SERVICES DIRECTOR

DATE: JANUARY 28, 2025

Reviewed by:

City Manager: AP

SUBJECT:

UPDATES TO THE TREE POLICIES AND GUIDELINES MANUAL (FUNDING SOURCE: GENERAL FUND)

SUMMARY

In February 1997, the City Council adopted what is now known as the Tree Policies and Guidelines Manual. The Manual guides the day-to-day maintenance standards of the City's urban forest. Over the years, the Manual has been updated to address changes in the urban forest maintenance industry and the priorities of the Claremont community.

The City's urban forest program has been scrutinized since the windstorm of January 2022, with staff and the community questioning many of the maintenance practices outlined in the Manual. To address these concerns and to verify that the City's maintenance activities are in line with industry standards, staff solicited proposals for urban forest professional services. In July 2023, the City Council entered into an agreement with Dudek for their review and update of the City's Tree Policies and Guidelines Manual.

Dudek was charged with reviewing the current Tree Policies and Guidelines Manual. The goal of the review was to recommend changes that meet current industry standards while considering community character, fiscal responsibility, and compliance with State and local regulations (e.g. the Americans with Disabilities Act), as well as compliance with guidelines and standards set forth by the California Joint Powers Insurance Authority, the City's insurance provider.

Over the past eighteen months, Dudek has held several meetings with City staff and the community. Input received during these meetings along with updated industry standards have shaped the revisions recommended to the Tree Policies and Guidelines Manual. In December 2024, the revised Manual was brought before the Tree Committee for review and approval. The Tree Committee unanimously approved the revised Tree Policies and Guidelines Manual. The Community and Human Services Commission unanimously approved the revised Tree Policies and Guidelines Manual. The

Manual is now ready for review and approval by the City Council.

RECOMMENDATION

Staff recommends the City Council approve the Tree Policies and Guidelines Manual as presented.

ALTERNATIVE TO RECOMMENDATION

In addition to the recommendation, there is the following alternative:

- Refer the matter back to staff for additional information.

FINANCIAL REVIEW

The approval of the revised Tree Policies and Guidelines Manual has no immediate financial impact on the City. Implementation of the revised Tree Policies and Guidelines Manual will be budgeted accordingly and reviewed as necessary.

The cost of services provided by Dudek under their agreement totals \$75,775.

The staff cost to prepare this report and administer this project is estimated at \$24,272 and is included in the operating budget of the Community Services Department.

ANALYSIS

Background

In 1997, the City Council adopted the Tree Policy Manual (now the Tree Policies and Guidelines Manual), which describes the day-to-day operations and maintenance guidelines for the City's urban forest. The Manual outlines the guardianship for the urban forest and gives City staff the responsibility of providing the daily management and emergency services to sustain the City's urban forest. The Manual also includes the City's standards for planting, trimming, and removal of trees within the urban forest.

The Tree Policies and Guidelines Manual has been revised over the years to stay current with industry standards and the priorities of the community. Most changes have been minor and directed by City staff, with the most noted revision occurring in 2015. In 2015, City staff and a group of community members recommended revisions to address drought conditions, reforestation requirements, species mitigation, and pest/disease treatments. Since that time, only minor revisions have been made, mainly addressing nursery stock standards to meet grant requirements. All revisions to the Tree Policies and Guidelines Manual have been recommended by the Tree Committee and the Community and Human Services Commission and adopted by the City Council. The current Tree Policies and Guidelines Manual is included as Attachment A.

Much has changed in the industry and the community over the past eight years, most notably the ongoing drought, the Windstorm of 2022, and increasing conflicts between trees and hardscape/infrastructure. Another industry change that is occurring is a movement towards reforestation with more climate-appropriate and native species. To address these changes, staff recommended utilizing the services of an outside urban forest consultant to review the Tree Policies and Guidelines Manual. The goal of the review is to recommend changes that meet industry

standards while considering community character, fiscal responsibility, and compliance with State and local regulations (e.g. the Americans with Disabilities Act), as well as compliance with guidelines and standards set forth by the California Joint Powers Insurance Authority, the City's insurance provider.

In July 2023, the City Council entered into an agreement with Dudek for urban forest professional services. The project included a review of the existing Manual, initial comments for revision, a community input process, and final recommendations for revisions. Over the past eighteen months, an in-depth review of the Manual by Dudek, several internal staff meetings, and a vast community input process have occurred and helped shape the revised Manual, included as Attachment B.

Community Input Process

Three community meetings were held from September 2023 to December 2023. Each community meeting focused on a different goal or objective of the review process, which are noted below. Additionally, in October 2023 the Sustainability Committee reviewed the initial revisions and made recommendations for consideration.

Community Meeting and Topics

- September 2023 - Tree versus infrastructure conflicts and root pruning.
- November 2023 - Urban forest health versus tree risk and tree removal procedures.
- December 2023 - Tree conflicts versus ADA considerations and infrastructure conflict resolutions.

Following the three community meetings, staff and Dudek reviewed the public input received and made final revisions to the Manual. In May 2024, the revised draft was released to the public for a thirty-day public comment period. Staff received sixty suggested revisions during the public input period. Approximately fifty of the suggested revisions were incorporated into the final draft Manual.

In September 2024, a final community meeting was held to review the final draft Manual. After the final community meeting, staff met internally with Dudek to discuss the next steps and completed the Tree Policies and Guidelines Manual draft for review and approval. A complete list of all public comment received during the thirty-day public comment period is included as Attachment C. Additional comments submitted after the publication of the agenda for the January 16, 2025 Community and Human Services Commission Special Meeting are included as Attachment D.

Goals and Objectives

City staff and the community presented many goals and objectives for the revision process. The complete list of goals and objectives is included as Attachment E.

Best Management Practices

Since the Manual was written by staff in 1997, City staff felt it was important to have a third-party urban forest professional review the Manual to ensure that the City's practices are in line with current industry Best Management Practices (BMPs). The industry is continually changing to address rigors of the urban forest, climate change, and sustainable practices. Dudek found the Manual to be generally current with industry BMPs but recommended a few clarifying changes. These changes were minor, primarily related to changes in industry terminology, nursery stock standards, and species diversification.

Tree Maintenance and Wildlife Protections

Bird nesting season in California occurs each year during the months of February through November. The City's grid trimming season runs from November through April of each year. The two activities overlap, shortening the City's timeframe for grid trimming. The City's tree maintenance contractor, West Coast Arborists, Inc. (WCA), has a robust wildlife protection program, including the care and protection of nesting birds. As a standard protocol, WCA will not trim a tree with signs of bird activity. WCA will post a notice on the tree, skip trimming, and return to trim when there are no signs of bird activity. In response to requests for information regarding instances of tree trimming affected by bird activity, the City will annually report the number of trees with bird activity noted, providing transparency in the City's protection of wildlife.

Maintaining the Tree Canopy

Focus should be placed on maintaining a healthy tree canopy rather than on the number of trees in the urban forest. Maintaining the tree canopy and fostering climate resiliency includes protecting mature trees, responsible planting, and proactive removal and replacement programs. Protecting a tree's root system is essential to protecting mature trees. Often during construction and development projects, tree root systems are damaged. The revised Manual includes a more robust tree protection zone program. Additionally, the revised Manual will foster climate resiliency by planting the "right tree in the right place," species diversification, and, when necessary, developing and implementing proactive removal and replacement programs. These minor changes to the Manual will contribute to maintaining a healthy tree canopy for many years to come.

Removal Parameters

It is the City's policy to protect and preserve healthy trees whenever possible; however, it is inevitable that trees will require removal at some point. The community expressed concerns regarding removal categories, notification procedures, removal documentation, and lack of opportunity for input regarding removals.

Removal Categories: In response, the categories for removal were changed from "dead," "diseased," and "hazardous" to "emergency" and "non-emergency" removals. Emergency removals include hazardous trees and dead or severely declining trees. Non-emergency removals include declining trees, infrastructure conflicts, and other necessary removals.

Notification Procedures and Community Input: Currently, the Community Services Department provides a report of plantings and removals monthly to the Community and Human Services Commission. The revised procedures for emergency removals are the same. For non-emergency removals, recommended removal sites will be posted on the City website for a fifteen-day notification period prior to removal to allow for community input.

Removal Documentation: Currently, removal notes are documented in the City's urban forest inventory system. The revised Manual requires an arborist report for all non-emergency removals. The report and photos will be available during the fifteen-day notification period.

Infrastructure Conflict Resolutions

Historically, the Manual addresses infrastructure conflicts loosely. The revised Manual aims to ensure all potential resolutions are considered prior to tree removal by utilizing a systematic procedure. The systematic approach includes a matrix of criteria within a flow chart guiding the resolution through predetermined criteria. The outcome will then be determined through the matrix and not solely based on the opinion of an arborist. It should be noted that Americans with Disabilities Act (ADA) requirements will always be adhered to. Also included are several alternatives to consider prior to

tree and/or root removal to make necessary infrastructure repairs.

Communication, Transparency, and Procedure

Throughout the community input process, the community expressed concerns regarding communication, transparency, and following procedures. The City addressed these concerns by building in several courses for communication, transparency, and procedures, including a public input process regarding non-emergency removals, more robust documentation regarding removals, and transparency regarding wildlife activity.

Goals and Objectives - Not Addressed in Revision

Through the community input process, several concerns were brought to the City's attention that did not fall within the purview of Dudek's scope of work. The first concern involves the roles, responsibilities, and members of the Tree Committee, which is outlined in Section 12.26 of the Claremont Municipal Code. The composition and responsibilities of the Tree Committee will be evaluated as part of the Urban Forest Management Plan review but may require evaluation of other City Planning Documents (e.g. General Plan, Municipal Code).

Another concern was establishing requirement of an Urban Forester position or other City staff with such a credential. At this time, the City does not have an Urban Forester position; therefore, this would require the creation of a new position. In addition, the title of Urban Forester is new with very few credential programs available.

Finally, the community requested a review of the Urban Forest Management Plan (UFMP) to ensure that the Tree Policies and Guidelines Manual, UFMP, and goals of other City plans align. The 2024-26 Community Services Budget includes a review of the UFMP, which will include aligning the UFMP with other City plans/documents. The UFMP review will also update the goals included in the Plan. Review of the Urban Forest Management Plan will begin once the Tree Policies and Guidelines Manual is approved.

Tree Policies and Guidelines Manual Update

The update to the City's Tree Policies and Guidelines Manual provides updated BMPs, transparency, protections for established trees, more robust community input procedures, and recommendations for urban forest resiliency. Staff recommends that the City Council approve the Tree Policies and Guidelines Manual as presented.

RELATIONSHIP TO CITY PLANNING DOCUMENTS

Staff has evaluated the agenda item in relationship to the City's strategic and visioning documents and finds that it applies to the following City Planning Documents: Council Priorities, Sustainable City Plan, General Plan, and the 2024-26 Budget.

CEQA REVIEW

This item is not subject to environmental review under the California Environmental Quality Act (CEQA).

COUNCIL COMMITTEE/COMMISSION REVIEW

On December 18, 2024, the Tree Committee unanimously approved the revised Tree Policies and

Guidelines Manual as presented. An excerpt from the draft December 18, 2024, Tree Committee Meeting minutes is included as Attachment F.

On January 16, 2025, the Community and Human Services Commission approved the revised Tree Policies and Guidelines Manual as presented. An excerpt from the draft January 16, 2025 Community and Human Services Commission Special Meeting minutes is included as Attachment G.

PUBLIC NOTICE PROCESS

The agenda and staff report for this item have been posted on the City website and distributed to interested parties. If you desire a copy, please contact the City Clerk's Office.

Submitted by:

Prepared by:

Jeremy Swan
Community Services Director

Cari Dillman
Community Services Manager

Attachments:

- A - Current Tree Policies and Guidelines Manual
- B - Updated Tree Policies and Guidelines Manual
- C - Public Comment Log
- D - Additional Public Comment
- E - Goals and Objectives
- F - Excerpt from the Draft 12-18-24 Tree Committee Meeting Minutes
- G - Excerpt from the Draft 1-16-25 CHS Commission Meeting Minutes

City of Claremont

Tree Policies and Guidelines Manual



Community Services Department
(909) 399-5431

Adopted: February 1997
Revised: November 1999
June 2007
June 2011
January 2015
September 2017
May 2020



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INTRODUCTION

Statement of Commitment

Claremont is a community which recognizes its trees as one of its most valuable resources. It is for this reason, that the City has dedicated itself to the preservation, proper maintenance, and continued enhancement of our community forest. The over 26,500 City street and park trees throughout Claremont are a community asset valued at more than 90 million dollars. The community forest provides environmental benefits, adds to property values, and contributes to an enhanced quality of life for all of Claremont's residents. Trees also represent a significant facet of our community heritage, playing a central role in the history of the City. The City had a Tree Committee even before it had a formal City Council. These early citizens set a standard of dedication to tree preservation for the enrichment of the community.

There are many benefits to having a healthy, well-maintained community forest, including helping to reduce the "heat island" effect which results from having extensive amounts of unshaded hardscape, conserving energy by reducing cooling costs, significantly increasing property values, slowing down harsh winds, muffling street and traffic noise, and providing shade and overall beauty to our community. Trees improve the environment in which we live by moderating the climate, providing oxygen, filtering out particulate matter from smog-laden air, conserving water, reducing erosion, and harboring wildlife within our urban setting.

Unfortunately, our trees suffer from the rigors of urban life, including air pollution, vandalism, compacted soils, limited growing spaces, and the extremes of the Southern California climate. In order to overcome such rigorous growing conditions for our City trees and reap the benefits of these, our most valuable assets, the care of our community forest must be a public/private partnership.

Urban Forest Management Plan

In February 2020, the City Council adopted an Urban Forest Management Plan. The Urban Forest Management Plan is meant to be a guiding document giving direction on how the urban forest should be enhanced and maintained. It discusses trends and issues that may affect the urban forest and provides a framework to develop a holistic approach to the urban forest program. The plan is a working document that will continually be implemented and monitored over the next 40 years. The Urban Forest Management Plan acts as a long-term guide to the urban forest, while the *Tree Policies and Guidelines Manual* directs the day-to-day operations of the urban forest program.

The Tree Policy Manual

This Tree Policy Manual defines and illustrates the policies and procedures that shall be utilized by City staff in the management and care of all trees located on City property or

within the City's public right-of-way. The following pages document the City of Claremont's official guidelines for the planting, pruning, removal, preservation, and protection of all City-owned trees, herein referred to as Claremont's community forest. These policies shall be based upon the highest nationally accepted standards set for tree care, and shall act as the source reference by City staff for the implementation of the duties, authorities and regulations delineated in Chapter 12.26 of the Claremont Municipal Code (Appendix A). The most updated version of the Claremont Municipal Code can be found on the City website at www.ci.claremont.ca.us. These policies have been established to address the specific needs of Claremont's community forest and should be considered as a whole. Any inconsistency should be viewed in terms of the underlying intent.

Guiding Principles

The City shall adhere to the following principles in all its tree-related policies and processes:

- Recognize that the trees of our urban forest are more than aesthetic enhancements.
- Trees are the backbone of our urban ecosystem and an essential part of our community's green infrastructure.
- Promote the health and growth of our urban forest by following scientifically established best practices for tree selection, planting, watering, and pruning.
- Promote a robust urban forest through policies and practices that reduce its vulnerability to known diseases or pest infestations, and future threats, including the anticipated effects of climate change.
- Engage in a continuous process of long-range planning for the growth and maintenance of our urban forest.
- Promote public appreciation of our urban forest through educational outreach programs.
- Support local businesses, institutions, organizations, and individuals in their efforts to grow and maintain our urban forest through community education.
- Proceed in a manner that is inclusive and transparent.

Amendments to Policies

These policies shall be reviewed on a regular basis. Amendments may be initiated by staff or members of the Tree Committee, Community and Human Services Commission, or City Council. The City Council reserves the right to approve amendments to the policies, if it is deemed by majority opinion that such revisions or updates are necessary. Any amendments to these policies sought by other public or private interests shall first receive approval from the City Council.

City Easements and Right-of-Ways

Section 12.26.010 of the Claremont Municipal Code (Appendix A) defines "easement," "parkway," or "right-of-way".

The City retains an established right-of-way or easement on each public street. These easements are City-controlled areas for the purpose of public improvements, including streets, sidewalks, curb and gutters, driveway approaches, streetlights, street signs and street trees.

Easements may vary per street and will usually extend beyond street width. Generally, the width of these parkways or landscape easements are around ten (10) feet from the face of the curb, but this dimension may range from anywhere between one (1) foot and thirty (30) feet. The City Engineer shall keep official record of the City easements.

Any tree located within this public easement is recognized as a City-owned tree and is subject to the policies described herein and in the Municipal Code (Appendix A), which govern all City trees and public property.

GUARDIANSHIP FOR THE COMMUNITY FOREST

The City Council

The elected officials of the City provide leadership, at the request of the citizens, to ensure that our community trees continue to be a priority in Claremont. They oversee the funds which support the forestation and preservation of the community forest. They also make decisions regarding policies and ordinances which pertain to the care and protection of all trees on public property as well as to the development and enhancement of private property.

The Community and Human Services Commission

Section 12.26.020 of the Claremont Municipal Code (Appendix A) defines the duties of the Community and Human Services Commission.

The commission is made up of City Council appointed citizen representatives, who serve, among other capacities, as the City's tree advisory board. The commission appoints a Tree Committee from its membership on an annual basis and holds regular meetings for the purpose of reviewing tree-related issues and determining the needs of the City with respect to its tree planting and maintenance programs. The Tree Committee and commission make recommendations to the City Council on policies and ordinances, which pertain to the care and protection of public trees. The Tree Committee and commission also make decisions on selecting specific species of trees for designation along City streets. As representatives to the community, commissioners

also help educate and inform the public on proper tree care and promote the value of trees to the community.

The Community Services Department

The Community Services Department is responsible for providing the daily management and emergency services which sustain our community forest. The department provides forestation and maintenance services and oversees all contracted and permitted work on City trees. The department retains and updates the City's tree inventory and is the primary resource for residents who contact the City with concerns and questions about trees. The department also provides to residents educational materials on proper tree care, information on specific City trees, as well as sponsors City-wide events, such as the annual Arbor Day celebration, to enhance the public's awareness of the important role trees play in the community.

Section 12.26.030 of the Claremont Municipal Code (Appendix A) defines the duties of the Director of Community Services. Under general direction from the Director of Community Services, department staff and an International Society of Arboriculture (ISA) Certified Arborist shall be responsible for overseeing the care and management of the community forest.

The Property Owners and Residents of Claremont

Section 12.26.040 of the Claremont Municipal Code (Appendix A) defines the duties of the private property owners in the care of public trees.

Tree care responsibilities for the residents of Claremont include protecting and providing enough water to promote the health and viability of any City tree located within the public easement on their property, and notifying the Community Services Department of any suspected tree hazards or maintenance needs that their City trees may require.

FOUNDATIONS FOR TREE PRESERVATION

The foundations for the preservation and enhancement of our community forest are based upon Claremont's General Plan, Land Use and Development Code, and Municipal Code (Appendix A).

The General Plan

Claremont's General Plan refers to trees in several of its elements. The goal of these tree management policies is to carry out the policies of the plan as follows.

Land Use, Community Character, and Heritage Preservation Element

Community Design Section:

“On-going maintenance and enhancement of Claremont’s street trees through implementation of the City’s Tree Policy Manual will continue to promote streets as sustainable community “places” that provide shade and contribute to clean air. The City is committed to preserving its existing street trees, replacing trees that are damaged or dying, and expanding community forests in newer areas of Claremont.”

Policy 2-13.1: Maintain and enhance the City’s collection of street trees and improve Claremont’s image of a “City with trees.”

Policy 2-12.4: “Encourage all new development to preserve the natural topography of a site and existing mature trees.”

Open Space, Parkland, Conservation, and Air Quality Element

Street Trees and Community Forest Section:

“While trees add considerably to the aesthetic quality of Claremont, “community forests” also promote a good community environment and provide biological benefits. They contribute to clean air, provide cooling shade, support wildlife, increase property values, control soil erosion and conserve water, create sound barriers, and provide protection from high winds. The community forest is comprised of a street tree system, trees on parks and other public lands, and trees on private properties and in yards throughout the City. The community forest is distinct within established areas of Claremont where trees have fully matured, particularly in The Village, Historic Claremont, Old Claremont districts, and on The Claremont Colleges’ campuses. The City is committed to preserving its existing trees, replacing trees that are damaged or dying, and expanding community forests in newer areas of Claremont.”

Policy 5-8.1: “Develop a tree planting policy that strives to accomplish 50% shading of constructed paved and concrete surfaces within five years of construction.”

Policy 5-8.2: “Provide adequate funding to manage and maintain the City’s urban forest, including sufficient funds for tree planting, pest control, scheduled pruning, and removal and replacement of dead trees.”

Policy 5-8.3: “Coordinate with local and regional plant experts (e.g. Rancho Santa Ana Botanic Garden) in selecting tree species that respect the natural region in which Claremont is located, to help create a healthier, more sustainable urban forest.”

Policy 5-8.4: “Safeguard and enhance Claremont’s community forest by protecting existing stands of trees and other plant material of substantial value.”

Policy 5-8.5: “Continue to plant new trees (in particular native tree species where appropriate), and work to preserve mature native trees.”

Policy 5-8.6: “Increase the awareness of the benefits of street trees and the community forest through a citywide education effort.”

Policy 5-8.7: “Continue to manage and care for all trees located on City property or within the City’s right of way.”

Policy 5-8.8: “Provide information to the public on correct tree pruning practices.”

Policy 5-8.9: “Encourage residents to properly care for and preserve large and beautiful trees on their own private property.”

Policy 5-18.5: "Continue to require the planting of street trees along City streets and inclusion of trees and landscaping for all development projects to help improve airshed and minimize urban heat island effects."

Measures for Implementation, Streets section, Measure E. "Street trees shall be selected for their adaptability to the City's environmental conditions, visual characteristics, and shading. Deciduous trees shall be used so that shade is provided in summer with open views in winter."

Land Use and Development Code

Chapter 4, Part 1

Section 413.B Yard Landscaping Requirements

“A minimum of one tree per fifty feet of lot width in addition to street trees is encouraged.”

The Claremont Municipal Code

Chapter 12.26 of the Claremont Municipal Code (Appendix A) establishes the duties, authorities and regulations governing all City trees. All of the tree management policies found herein are based upon this ordinance. The purpose of these policies is to implement this section of the Municipal Code (Appendix A).

GENERAL PRESERVATION AND PLANNED MANAGEMENT

One of the most important aspects of preserving Claremont's community forest is the ability to retain a manageable population in terms of species diversity, density and appropriateness. The City shall achieve this through proper planning and gradual reforestation efforts, rather than through drastic deforestation and replacement measures, whenever possible. No healthy, living tree shall be removed for the sole purpose of altering an area's existing tree species composition.

Species Diversification and Density

A diversified population of tree species helps to guard against the negative impacts of monocultures. Monocultures, large populations of a single tree species, may be ravaged during insect or disease epidemics. On the other hand, too diversified a population may create an unmanageable inventory of trees. Thus, as a means of controlling species vicissitude, it shall be the goal of the City to retain a population of trees in which the optimum quantity of a single tree species shall make up between .5 and 5 percent of the total tree population, and that no single tree genus shall exceed 12 percent of that population.

Heritage Trees and Historic Grove Preservation

Specific trees, which by virtue of their species, size, age, appearance or historical significance are determined to be outstanding, shall be protected by declaration of Heritage Tree status, and shall so be protected by ordinance. Sections 12.26.010 and 12.26.090 of the Claremont Municipal Code (Appendix A) defines "Heritage Trees" and the protection criteria established for them.

Historic groves of a particular species in a specific area, such as the American Elms along Indian Hill Boulevard and the Eucalyptus trees along College Avenue, shall also be afforded the same protective status as Heritage Trees.

In order to, preserve unique neighborhood characteristics, iconic streets with mature, integrated canopies will be preserved and continue to have the historically dominant species planted as long as the streetscape remains healthy and vibrant.

All nominations for Heritage Tree or historic grove candidates shall first be reviewed and approved by the Community and Human Services Commission. The Community Services Department shall retain a detailed inventory record of all Heritage Trees. A copy of the Heritage Tree and Historic Grove List is included in the Appendix B of this manual.

The City shall encourage property owners to consider nominating large trees on private property as candidates for Heritage Tree status. To be considered a Heritage Tree on private property, the tree must be visible from publicly accessible location(s).

Claremont's Designated Street Tree List

Claremont's tree population management plan shall be based primarily upon the City's Designated Street Tree List. Section 12.26.010 of the Claremont Municipal Code (Appendix C) defines and authorizes the creation and implementation of this list. A copy of the Designated Street Tree List is included in the Appendix C of this manual.

The Designated Street Tree List identifies several tree species designated for each City street, including drought-tolerant varieties. Multiple species are identified in an effort to increase species diversification, prevent deforestation related to pests and disease, and minimize the negative impacts of species monocultures. Providing a selection of species also provides options for locations where there are overhead clearance conflicts or grow space limitations. In some cases, selection of tree species may be designated for a particular block or segment of a street.

Each street shall be assessed, and a selection of designated species chosen to ensure that the right tree is planted in the right place. Appropriate tree species shall be selected for designation based upon the following criteria:

- **Species hardiness.** Based upon the trees adaptability to the region in terms of its resistance to frost or freezing temperatures.
- **Growspace.** The amount of parkway space available relative to the expected tree trunk circumference and root flare at maturity.
- **Overhead clearance.** The potential for conflicts between the tree's canopy and overhead obstructions, such as utility lines, at the tree's mature height.
- **Character and basic design plan for the neighborhood.** The general compatibility between the tree and its location; e.g., an eighty foot tall tree may not be appropriate in a neighborhood of small, single story homes.
- **Pest and disease resistance.** Species known for having a lack of significant pest or disease problems are preferred.
- **Drought tolerance.** Species that are more tolerant of long, dry periods and lack of water are preferred.
- **Durability and wind resistance.** Species that are not brittle in nature and provide for good wind buffers are preferred.
- **Canopy and subsurface growth habits.** Species that do not have growth characteristics such as invasive surface roots, extensive sucker production, or abundant fruit litter are preferred.
- **Irrigation drainage and soil qualities.** Trees that do well under a variety of different irrigation and soil conditions are preferred.
- **General aesthetics and shading potential.** Trees that provide some aesthetic benefits, such as showy flowers or attractive fall color, or trees that provide a good amount of shade are preferred.

- **Existing, traditional or native plant palettes.** Species that already exist in a particular area, have traditionally or historically existed in that area, or are native to this region are preferred.
- **Availability.** Trees that are generally available in local nurseries are preferred.
- **Substitution of Cultivars.** Staff has the ability to substitute different cultivars of the Crape Myrtle, Redbud, or Chitalpa if the designated cultivar is not available.

Designated street trees, unless otherwise noted, are standard form single trunk trees to accommodate their eventual mature size. This form is best to maintain safe vehicle and pedestrian access around the tree. Multi-trunk trees are not an approved form for a Street tree unless approved by staff for a valid reason.

The Designated Street Tree List shall be retained by the Community Services Department. The list shall identify every public street in the City with approximately three to five designated species being denoted in both botanical and common names.

Redesignation Process

Sections 12.26.020 and 12.26.030 of the Claremont Municipal Code (Appendix A) declares that all revisions or updates to the Designated Street Tree List shall first be reviewed by the Director of Community Services, or his or her designee, and forwarded to the Community and Human Services Commission for approval.

Property Owner Appeals. If a property owner does not agree with the Commission's decision, the property owner may appeal the decision to the City Council. The Community Services Department shall provide interested property owners with information on the commission appeal process.

Inventory Administration

The Community Services Department shall keep current an inventory of all City-owned trees, including detailed site characteristics and work histories for each tree. This record shall be updated on a continual basis by the City's contractor and/or staff.

The inventory of City trees identifies location, species (both scientific and common names), location, diameter (DBH), height, parkway size, overhead utilities, estimated asset value, recommended maintenance, and work history.

MAINTENANCE GUIDELINES

Planting

Sections 12.26.050 and 12.26.060 of the Claremont Municipal Code (Appendix A) establish the conditions for all tree plantings that take place on City property or within

City right-of-ways. The Community Services Department shall be responsible for the planting of all City trees. The following guidelines have been developed to promote the health and safety of City trees from the time that they are planted through their maturity. These specifications shall be required for any City tree that is to be planted.

Season to Plant. Unless otherwise approved by the Community Services Department, most planting of trees shall take place between mid-fall and early spring to take advantage of the dormant period for most trees and the cooler, wetter seasons of the year. If a resident wants a tree planted sooner than the City schedule can accommodate, they may make a tree donation to the City (refer to the Tree Donations section of this manual).

Viable Planting Sites. It shall be the objective of the City to plant all viable vacant sites located on City property or within City right-of-ways, to honor all resident requests for new street trees in viable locations, and to replace any City tree which has been removed with the provision that the remaining vacant site is viable for planting. Viability shall be based upon the following criteria:

- **Spacing.** There is adequate spacing present overhead, underground and radially to allow for the healthy, unimpeded growth of the tree to its mature size. Specific examples of spacing conditions that may make a site unsuitable for planting include inappropriate canopy room between existing trees, too close a proximity of a planting site to existing water, gas or sewer lines, potential for conflict with overhead power lines, or inadequate width of the location's parkway for accommodating the tree's girth.
- **Traffic Clearance.** There is adequate line of sight visibility between normal vehicular or pedestrian traffic and necessary signage, street lights or views.
- **Maintenance Resources.** There is an adequate and consistent water source available.
- **Funding.** There is funding available in the current fiscal year's budget for tree planting.

Replacement Trees. Each year staff and the City's arborist will together determine a list of appropriate planting sites. This list will include resident requests for new trees and those that have been removed and are in need of replacement. Staff will follow the guidelines outlined above to determine if a new site is viable.

After evaluating these criteria, staff and the arborist will determine if there is an appropriate site at each location to plant one or more trees.

Resident Notification. The City staff or Arborist will evaluate all potential planting sites to determine if they are viable. Properties that have a viable planting site will receive a letter confirming that the City will plant a tree at the property. The notification letter will provide a timeline for planting and will outline the environmental and economic benefits of City trees as well as the watering requirements. Residents will be invited to select the species of tree that will be adjacent to their property from the options available on the Designated Street Tree List. Prior to planting, the curb will be marked identifying the location for planting.

Properties that are non-responsive are less likely to water and care for a City tree leading to high mortality rates and will therefore not receive new trees. Viable sites on non-responsive properties will be moved to the bottom of the City's planting list deferring planting to a future date.

Nursery Stock Standards. The City shall make every effort to insure that it plants only vigorous, healthy trees which can easily be trained into an attractive natural form, with strong roots and good crown development. The specifications for acceptable nursery stock shall be as follows:

- All trees shall be true to type or botanical name as ordered or shown on planting plans.
- All trees should be of a size equivalent to that of a 15-gallon containerized tree with a trunk caliper of one- and one-half inches (1.5"), or greater, measured at six (6) inches above soil grade. Exception shall be made by a staff arborist on trunk caliper size that is less than one and one half inches (1.5") based upon inspection of the tree.
- All trees shall have a single, fairly straight trunk with a good taper and good branch distribution vertically, laterally and radially. Multi- trunk trees will not be accepted, unless specifically order by City staff.
- All trees shall be healthy, have a form typical for the species or cultivar, be well rooted, and shall be properly trained.
- The root ball of all trees shall be moist throughout and the crown shall show no sign of moisture stress.
- All trees shall comply with Federal and State laws requiring inspection for plant diseases and pest infestations.
- No tree shall be accepted that has been severely topped, headed back, pollarded or lion-tailed.

- No tree shall be accepted that has co-dominant stems or excessive weak branch attachments that cannot be trained out without jeopardizing the natural form of the species.
- No tree shall be accepted that is root bound, shows evidence of girdling or kinking roots, or has "knees" (roots) protruding above the soil.

The City shall reserve the right to refuse any nursery stock that does not meet these standards and may require any person who has planted such sub-standard trees, on City property or within City right-of-ways, to have these trees removed and replaced at that person's own expense.

Planting Material Standards. Unless otherwise approved by the Community Services Department, all City trees shall be planted using materials that meet the following criteria:

- Tree Stakes - Shall be two (2) sturdy, ten (10') foot long lodge pole pine stakes. Stakes shall be placed on the outer edge of the root ball on either side of the tree, parallel to the curb or walkway, or perpendicular to prevailing winds.
- Staking Ties - Shall be sixteen (16) to eighteen (18") inch rubber cinch ties to be fastened to each stake with galvanized roofing nails. Ties will be pulled around the tree's trunk in a manner which supports the top-heaviness of the canopy, but is loose enough to allow for free movement of the tree in the wind.
- Wood Chip Mulch - A three (3") to four (4") inch layer of City-approved wood chip mulch shall be placed within the planting basin of the tree. A space of three (3") inches shall be left between the tree's stem and the mulch layer to allow airflow and to restrict moisture from remaining static around the base of the trunk.
- Appropriate linear root barriers may be utilized adjacent to hardscape as recommended by a certified arborist. Types to be considered include herbicide treated fabric, plastic or any other types as deemed appropriated by a certified arborist.

Tree Planting Specifications. Most nursery tree stock in California is sold in a containerized form. The following guidelines are specific for containerized stock. If utilizing bare root or balled and burlaped trees, refer to the appropriate ISA guidelines for planting instructions.

All trees shall be planted immediately after the planting container has been removed. Containers shall not be cut or otherwise damaged prior to delivery of trees to the planting area.

The planting hole is one of the most important factors in establishing a healthy tree. Measure the width and depth of the root ball prior to digging. The diameter of the planting hole shall be dug at least two (2) times wider than that of the root ball. The depth of the planting hole shall be dug slightly shallower than the depth of the root ball to allow for the top two (2") inches of the root crown to remain above the finished grade.

Before placing the tree into the planting hole, tamp down the base of the hole to allow the tree to stand straight and to avoid the potential of the tree settling below the finish grade. Scarify or scrape the sides of the planting hole to break down any glazing or compaction which may have occurred as a result of digging.

Position the tree in the hole so that the tree stands upright and the top of the root crown is slightly exposed above the grade. Then, backfill the planting hole with clean, native soil no higher than halfway up the root ball. Slightly tamp the soil to remove air pockets but be sure not to compact the soil too much. Complete the backfilling to the finish grade. Once again, tamp the soil slightly to remove air pockets.

Form a watering basin out of backfill material, approximately six (6") inches high, around the drip line of the tree. Remove all nursery stakes, ties, and ribbons from the tree, and install the planting materials as specified above. Give the tree an initial deep watering.

Tree stakes and ties should be removed from the tree within three years after planting, or when the circumference of the tree's trunk is equal to or exceeds the circumference of the stakes.

For specific details on proper planting procedures refer to the City website at www.ci.claremont.ca.us/trees.

Site Cleanup. Work areas shall be left in a condition equal to or better than that which existed prior to the commencement of forestry operations. All debris shall be cleaned up each day before the work crew leaves the site, unless permission is given by the City to do otherwise. All lawn areas shall be raked, all street and sidewalks shall be swept, and all brush, branches, rocks or other debris shall be removed from the site.

Maintaining the Tree's Growing Space

A tree in a natural forest will deposit mulch in the form of fallen leaves or pine needles, several inches deep at its base. Naturally occurring mulch provides nutrients while allowing air and water to permeate the soil.

In urban environments, however, residents and property owners may have reasonable concerns about preventing the growth of weeds around the base of trees and avoiding the accumulation of leaves and pine needles that may clutter walkways.

Acceptable Methods of Mulching and Weed Suppression. Mulching the planting area with 3-4 inches of wood chips or chunk bark is recommended. Weed barriers, if used, should be made of permeable fabric.

Unacceptable Methods of Weed Suppression. Property owners shall avoid applying any landscaping material to the base of trees that will compress the soil below it or make it impermeable to air and water:

- Bricks
- Cement
- Heavy rocks or boulders
- Plastic weed barriers

Property owners shall use caution with mechanical equipment around the base of trees. Mechanical equipment includes lawnmowers and/or weed whackers. Mechanical damage inflicts significant injury to trees which could eventually lead to its death. Mechanical equipment damages the portion of the tree that contains the vascular system which carries water and nutrients to the tree. When damaged it inhibits the trees ability to do so causing the health of the tree to decline.

Watering Schedule

Section 12.26.040 of the Claremont Municipal Code (Appendix A) defines the responsibilities of property owners with a public easement over their property. These responsibilities include providing adequate water to any City tree planted in the easement.

Newly installed trees, including drought-tolerant species, are dependent upon supplemental irrigation until established, typically for two years. If a tree is native to areas of higher rainfall, then the tree will require supplemental water throughout its life cycle, unless the tree finds a subterranean water source. Periods of extreme heat, wind or drought may require more or less water than recommended in these specifications.

Deep Watering. Watering to the root depth, sometimes referred to as “deep-watering”, is a universally accepted best practice for nurturing the health of both newly established and mature trees.

The goal of deep watering is to deliver water to the lower extremity of the tree’s roots, promoting a deeper rooting of the tree and thereby reducing the tendency of roots to search for moisture at the surface. In urban environments, this produces the additional benefit of directing tree roots downward, where they are less likely to interfere with hardscape at street level.

Although deep watering is always preferable, it may not be sufficient to compensate for the typical root growth patterns of some tree species. The typical root growth pattern of

a species of tree should always be taken into consideration when planting new City trees.

Watering Newly Planted Trees. Watering requirements for newly planted trees will vary based on species, location, and soil conditions. Although professional advice should be sought whenever possible, the following recommendations generally apply:

During the first two years after a tree is planted in the ground it shall be watered thoroughly to their root depth as frequently as needed. The minimum standards shall be as follows:

- One to three months in the ground: four times per month or as necessary
- Four to six months in the ground: two times per month or as necessary
- Seven to twelve months in the ground: one time per month or as necessary

Newly planted trees should be watered slowly for several hours during each watering cycle in order to allow the tree's roots to adequately absorb the available water. Water may be provided in a variety of ways:

- Applying a garden hose on a slow drip for several hours
- Creating a "tree-well" around the base of the tree and filling it with water that can slowly be absorbed into the ground
- Using a drip irrigation system that is set to deliver water for several hours
- Filling a plastic bladder or "tree bag" with water and allowing it to slowly release water into the ground

In an effort to encourage appropriate watering practices for City trees, the City encourages the use of water bags when new trees are planted. Water bags may be filled by property owners once per week and provide slow release, deep water saturation to newly planted trees. The water bags also provide a visual reminder to property owners to water newly planted street trees. Tree watering bags are recommended during the first two years of establishment. Depending on available funding, the City may provide water bags at the time of planting. Watering bags are also available for private purchase through local retailers, including home improvement and garden suppliers.

Newly Planted Trees in Drought-Tolerant Landscapes. Newly planted trees in drought-tolerant landscapes still need water. Even if a species of tree is classified as "California native" or "drought-tolerant", it still requires regular watering. Once the tree is established, less water will be required.

Watering Established Trees. Effective methods of delivering water to the roots of an established tree vary depending on several factors. However, a few basic principles apply:

- Water slowly for longer durations. Doing so will allow more time for water to penetrate to the tree's root system. If water begins to run off, stop watering or cut back the rate of water flow so that it penetrates the ground. Allow sufficient intervals for the soil to dry out between watering.
- Water deeply rather than frequently. Depending on the age and species of the tree, soil type, shade, sun, slope, drainage, and current temperature, appropriate watering times may vary from as frequently as every ten days to as little as once per month.
- Water at the tree's "drip line." When it is raining, most mature trees naturally shed rainwater at the perimeter of the tree's canopy – much like an umbrella. This is the area capable of absorbing the most water and it is where watering efforts should be concentrated, if possible. Watering closer to the trunk is not as effective and may increase the risk of disease.

Tree Watering Alerts. The Community Services Department shall prepare community education regarding tree watering needs, including watering alerts during extreme weather conditions. Alerts shall be issued through the City website and through the City's other established public communication channels.

Pruning

The Community Services Department shall be responsible for any and all pruning of City trees. Section 12.26.090 of the Claremont Municipal Code (Appendix A) defines the custody and protections established for public trees. Tree pruning shall also meet or exceed Los Angeles County Fire standards for clearance. Further information on the Los Angeles County Fire standards can be found on the City website at www.ci.claremont.ca.us/trees.

All City trees shall be evaluated for pruning needs on a regular basis and pruned as necessary using professionally accepted standards, as established by the International Society of Arboriculture (ISA), Tree Care Industry Association (TCIA) and American National Standards Institute (ANSI) Section Z133.1. All City trees shall be pruned in a manner that will encourage good development while preserving their health, structure and natural appearance. For specific details on proper pruning refer to the City website at www.ci.claremont.ca.us/trees.

Pruning Techniques. "Thinning" cuts in mature trees shall be the standard pruning technique for City trees. A thinning cut is the removal of a branch at its point of origin, or the shortening of a branch to a lateral that is large enough to assume the terminal role.

When removing a live branch, pruning cuts should be made just outside the branch bark ridge and collar. This location of cut is in contrast to a "flush cut" which is made inside the branch bark ridge and collar. Flush cuts should be avoided because they result in a larger wound and expose trunk tissues to the possibility of decay. If no collar is visible,

the angle of the cut should approximate the angle formed by the branch bark ridge and trunk.

When removing a dead branch, the final cut should be made just outside the branch bark ridge and collar of live callus or wound wood tissue. If the collar has grown out along the branch stub, only the dead stub should be removed; the live collar should remain intact.

If it is necessary to reduce the length of a branch, the final cut should be made just beyond (without violating) the branch bark ridge of the branch being cut to. The remaining branch should be no less than one third (1/3) the diameter of the branch being removed, and with enough foliage to assume the terminal role.

Pruning cuts should be clean and smooth, leaving the bark at the edge of the cut firmly attached to the wood. A three-cut process, sometimes referred to as "jump-cutting", should be used to remove larger limbs in order to avoid stripping or tearing of the bark, and to minimize unnecessary wounding.

Prohibited Pruning Techniques. Use of the following pruning techniques on City trees is prohibited under any circumstances:

- Topping
- Heading Back
- Stubbing
- Lion-Tailing
- Pollarding
- Rounding-Over

Training Young Trees. All newly planted trees shall be placed on the City's written schedule to receive young tree maintenance immediately after completion of a planting program. Properly trained trees will develop into structurally strong trees well suited for their surrounding environment. These trees should require little corrective pruning as they mature. All City trees should be trained to develop in their own style, consistent with each species' natural growth pattern, rather than imposing a "standard style" on each tree. Young trees that reach a large mature size should have a sturdy, tapered trunk with well-spaced branches that are smaller in diameter than the trunk.

All newly planted trees shall be included in the City's Young Tree Maintenance Program. As part of the Young Tree Maintenance Program, each City tree shall be scheduled for training at least once within the first three years after planting. The Young Tree Maintenance Program shall include:

- evaluating the overall condition of the tree
- cleaning out of any dead wood
- selectively pruning the tree in such a manner as to develop good structure

- checking to ensure stakes and ties are providing adequate support for the tree
- examining the watering basin to verify that the tree is receiving adequate water

Pruning Mature Trees. As trees mature, their need for structural pruning should decrease. Pruning should then focus on maintaining tree structure, form, health and natural appearance, accomplished through one of the three methods described below. Specific details on proper pruning are included on the City website at www.ci.claremont.ca.us/trees and include the following processes:

- **Crown cleaning**, or cleaning out, is the removal of dead, dying, broken, diseased, crossing, weakly attached, and low-vigor branches from a tree's crown; as well as the elimination of water sprouts, sucker growth and foreign materials from the entire tree. Crown cleaning shall be completed on an as-needed basis.
- **Crown restoration** is intended to improve structure and appearance of trees that have sprouted vigorously after being broken, topped or severely pruned using heading cuts. One to three sprouts, on main branch stubs, should be selected to form a natural appearing crown. The more vigorous sprouts may need to be thinned or cut to a lateral to control length growth or ensure adequate attachment for the size of the sprout. Crown restoration may require several prunings over a number of years. Crown restoration shall be completed as is necessary, based upon the specific condition and circumstances surrounding the tree.
- **Crown thinning** is the selective removal of branches to increase light penetration and air movement through the crown. Thinning opens the foliage of the tree, reduces weight on heavy limbs, distributes ensuing invigoration throughout the tree and helps retain the tree's natural form.

When thinning the crown of mature trees, no more than fifteen percent (15%) of the tree's live growth should be removed. In slower growing or particularly sensitive species (such as native Oaks), no more than ten percent (10%) of live growth should be removed. Trees shall always be thinned to their natural form and should retain well-spaced inner lateral branches with foliage. Trees and branches so pruned will have mechanical stress more evenly distributed along the branch and throughout the tree.

Pruning Cycles. Frequency of pruning is also important to a tree's health. The frequency for a complete thinning of a tree's crown should be based upon that species' growth rate, growth pattern, propensity to breakage, and susceptibility to environmental factors. Each City tree shall be inspected and pruned as necessary, or as program funds allow. Funded pruning cycles shall not preclude any necessary maintenance that may be required on individual trees.

Resident Notification. Residents shall be notified of any large-scale crown-thinning project affecting a City tree located in front of their home.

Street, Sidewalk and Visibility Clearance. Street and sidewalk clearance standards shall be achieved through crown raising. Crown raising is the removal of lower branches in order to provide clearance for vehicles, pedestrians and bicyclists. Only those branches that must be removed to achieve the established height clearance standard shall be pruned. All such pruning cuts shall be thinned back to the nearest lateral found above the set minimum height standard. Where possible, young or developing trees should be maintained in such a manner that at least one half (1/2) of the foliage should be on branches that originate in the lower two thirds (2/3) of the tree. Similarly, branches should have even distribution of foliage along their lengths. This will ensure a well formed, tapered structure and will uniformly distribute stress within the tree.

All City trees shall be maintained to the height clearance specifications established below:

- **Over sidewalks or park paths**, limbs shall be raised to a minimum of seven (7') feet and a maximum of eight (8') feet from grade to wood. In locations where no sidewalks exist, limbs may be retained below this minimum elevation as long as they conform to the natural shape of the species. In locations where City street trees are set back from, or do not interfere with, sidewalk traffic, limbs may also be retained below this minimum height specification.
- **Over residential or collector streets**, limbs shall be raised gradually from eight (8') feet at curb to fourteen (14') feet over traffic lanes from the grade to wood giving the appearance of an arch rather than an angle. Select streets may require a higher maximum over traffic lanes for existing mature canopy-forming limbs.
- **Over arterial streets**, limbs shall be raised to fourteen (14') feet from grade to wood. Select streets may require a higher maximum over traffic lanes for existing mature canopy-forming limbs.

Visibility clearance for streetlights or signage shall be achieved through "windowing" through the foliage of a tree, rather than severely raising or reducing its crown. Only those branches that need to be removed to attain the visibility clearance desired shall be pruned. All such pruning cuts shall be thinned back to the nearest lateral found away from the structure that is to be cleared.

Utility Clearance Pruning. In general line clearance is performed by the utility companies. Line clearance tree workers must be trained to work safely around high voltage conductors. The United States Occupational Safety and Health Act (OSHA) and the American National Standards Institute (ANSI) have established minimum distances to be maintained by tree workers from electrical conductors. All line clearance work involving City trees shall adhere to these standards, as well as the utility pruning standards established by the International Society of Arboriculture (ISA) and the Utility Arborists Association (UAA). General Order 95, Rule 35 of the California Public

Utilities Commission (CPUC) mandates that trees must maintain an eighteen-inch clearance from high voltage transmission lines.

The following guidelines are designed to maintain the required clearance of City trees from high voltage transmission lines with a minimum of resprouting and fewer pruning cycles. These guidelines are based upon known tree responses to various pruning techniques. In no sense should they take precedence over safe work practices.

- As few cuts as are reasonable should be used to achieve the required clearances.
- Limbs should not be arbitrarily cut off based on a pre-established clearing limit.
- A tree's growth under utility lines is most economically managed by lateral or directional pruning (thinning cuts). Directional pruning (V-notching) is the removal of a branch to the trunk or a significant lateral branch growing away from the conductor. Heading cuts (topping), on the other hand, encourage vigorous sprouting and increase the frequency of pruning cycles and the cost of maintenance. Heading cuts are prohibited on City-owned trees.
- All trees should be examined for hazards before commencing with line clearance work.
- Hangers and dead wood should be removed.
- Where possible, the tree should be allowed to attain normal height, with crown development maturing away from high voltage conductors.
- Pruning should be restricted to removal of branches at crotches within the tree's crown.
- When the pruning of a branch will result in the loss of more than one half (1/2) of the foliage on the branch, it should be removed to the parent stem.
- Precautions shall be taken to pre-cut large limbs to avoid stripping or tearing the bark, and to minimize unnecessary wounding.
- Heavy limbs should be lowered on ropes to avoid damaging bark on limbs and trunks below.
- The placement of pruning cuts shall be determined by anatomy, structure and branching habit.
- Final drop-crotch cuts should be made outside the branch bark ridge on the main stem or lateral branch. The remaining branch shall be no smaller than one third

(1/3) the diameter of the portion being removed. The removed portion should be pruned out to direct the remaining growth away from conductors.

- The use of multiple, small-diameter shaping cuts to create an artificially uniform crown form, commonly known as a "round over", or a hedged side-wall effect, is not cost effective nor consistent with proper pruning practice. Both round overs and the topping of trees for line clearance shall be prohibited in the City of Claremont.

Root Pruning. The root system of a tree is one of its most important physiological components. Roots are the main source of water and mineral absorption for the tree, they provide anchorage and stability, and they act as one of the principal storage areas for food. The proper pruning of a tree's roots is as important as the proper pruning of a tree's crown.

Whenever possible, the City shall avoid removing any of a tree's root system. In instances where there exists a need to install subsurface structures or utilities, such as irrigation lines or block wall footings, every effort shall be made to avoid encroachment within the drip line of a tree. If it becomes necessary to excavate within a tree's drip line, every effort shall be made to tunnel under or through the tree's root system with a minimal amount of pruning, rather than to trench across the tree's roots. A guide to proper root pruning is available on the City website at www.ci.claremont.ca.us.

Note: Any root over three (3") inches in diameter must be pre-approved for removal by the City's Arborist.

Hardscape. When root removal becomes necessary for the installation or repair of hardscape, such as sidewalks, driveway approaches or curb and gutters, two methods shall be employed by the City to address invasive or encroaching roots. These two methods are specified below and are detailed on the City website at www.claremont.ca.us/trees.

- **Selective Root Pruning** is the removal of specific offending roots which are directly interfering with a work area. When pruning out selective roots, great care shall be given to retain as much root surface as possible, including sufficient buttress root dispersal around the radius of the tree. No more than 25% of a tree's root system shall be removed. Roots shall be cut back at least four (4") inches away from new hardscape to the nearest node. Pruning cuts shall be made clean and smooth with no crushing or tearing of the remaining root.
- **Root Shaving** is the removal of a small portion of a nonessential buttress root or general root with a diameter of four (4') inches or greater. Roots will be shaved down to allow for at least two (2') inches of clearance between the root and the new hardscape. No more than one third (1/3) of a root's diameter shall be

shaved off. Shaving cuts shall be made clean and smooth with no crushing or tearing of the remaining root.

Soil shall be backfilled immediately following pruning or shaving activity to minimize drying of the roots. Any root pruning or shaving on roots greater than two inches (2") in diameter shall be approved by the City's arborist.

Certified Arborist. Any City-contracted tree company shall be required to have in their employment a full-time permanent Certified Arborist, as accredited by the International Society of Arboriculture (ISA). This person shall be responsible for ensuring that the contractor's crews are performing work according to City specifications. The City strongly recommends that Claremont residents only use a firm that employs a Certified Arborist for any work performed on privately owned trees.

Certified Tree Worker. All crew leaders performing tree work on City trees should be trained according to tree care standards accepted by the International Society of Arboriculture and certified by this same organization.

Contractor Qualifications. All contractors shall be required to have a State Contractor's license for tree work and provide Worker's Compensation benefits to their employees. They should also provide equal opportunity employment and have appropriate liability insurance. Contractors shall provide all services in compliance with City specifications. Specifications are written based on the policies outlined in this manual. It is recommended that property owners utilizing contracted tree workers require proof of proper licensing/insurance and obtain several references before employing them.

Every contractor hired by the City to do tree work shall:

- Agree to perform all tree work according to the City Arborist's specifications and to follow the guidelines established in this Tree Policy Manual.
- Provide the City Arborist with the name and on-site phone number of each of its designated Crew Leaders for each day of work.
- Ensure that its Crew Leaders remain on site to supervise all work while it is being performed.
- Ensure that each Crew Leader has in his or her possession a complete and current copy of the City's Tree Policy Manual at all times while the contractor is performing work on City Trees.
- Ensure that all Crew Leaders are fully familiar with the contents and requirements of the Tree Policy Manual, to the extent that it impacts their work.
- Recycle green waste as directed in their contract.
- Have a valid State Contractor's license for tree work.
- Provide Worker's Compensation to their employees
- Provide equal opportunity employment.
- Have appropriate liability insurance.

Preventing the Spread of Disease. Any pruning of diseased trees shall follow the best horticultural practices, including sterilizing pruning tools after each cut. Green waste infected with disease shall not be comingled with clean green waste and shall be heated to kill pathogens.

Site Cleanup. Work areas shall be left in a condition equal to or better than that which existed prior to the commencement of forestry operations. All debris shall be cleaned up each day before the work crew leaves the site, unless permission is given by the City to do otherwise. All lawn areas shall be raked, all street and sidewalks shall be swept, and all brush, branches, rocks, or other debris shall be removed from the site.

Private Contracting. For any work performed on privately owned trees, the City recommends that residents

- hire only tree companies that employ an ISA-Certified Arborist
- require proof of proper licensing and insurance
- obtain several references before employing any company, and
- consult the ISA website (www.treesaregood.org) and inform themselves of ISA-recommended procedures for pruning young or mature trees, as applicable.

Pest and Disease Management

There are many regularly occurring pests and diseases found in urban landscapes. These can include aphids, scales, lerps, sharpshooters, white-fly, caterpillars, acorn weevils, powdery mildew, sooty mold, or anthracnose. These pests can create unsightly and/or nuisance symptoms in susceptible tree species. Symptoms can include honeydew/sap drop, skeletonized leaves, leaf curl/necrosis, or premature leaf drop.

Pests of this nature alone are not considered immediately detrimental to the long-term health of the tree or urban forest. Eradication of these regularly occurring pests is not always equitably feasible in a broad setting such as an urban forest. Because of this, chemical applications are not always practical or financially feasible. The City will consider treatment for pests that affect the health and safety of a tree not for aesthetic or nuisance complaints. Consideration for treatment will be considered on a case-by-case basis.

The best way to reduce pest problems is to use Best Management Practices during the planting, pruning, and care of the trees to promote optimum health. Healthy trees have natural defense mechanisms to that can withstand certain levels of pest and disease infestations.

However, in situations when more aggressive or newly introduced invasive pests and diseases are identified in the urban forest, additional control measures may be warranted in attempt to limit the establishment of these news threats in the urban forest.

To this end Claremont follows generally accepted Integrated Pest Management (IPM) techniques

IPM is a process used to solve pest problems while minimizing risks to people and the environment. Approaches for managing pests are often grouped in the following categories:

- **Cultural Controls:** Cultural controls are preventative practices that reduce pest establishment, reproduction, dispersal, and survival.

Mechanical and Physical Controls: Mechanical and physical controls eliminate a pest directly or make the environment unsuitable for it

- **Biological Control:** Biological control is the use of *beneficial organisms* to control pests and their damage.
- **Chemical Control:** Chemical control is the use of pesticides to control, prevent, or repel pests. The least hazardous and selective pesticide will always be utilized first for the identified pest. Further, a pesticide will only be applied in a discerning manner that targets the specific pest of concern while avoiding exposure to non-targets. Where applicable, selective treatments will be applied in combination with other IPM measures for more effective, long-term control.

Removal

It is the City's policy to protect and preserve healthy trees that provide valuable benefits to our environment and to the quality of life in Claremont whenever possible. Section 12.26.090 of the Claremont Municipal Code (Appendix A) defines the custody and protections established for all City trees.

The Community Services Department shall be responsible for all removals of City trees. The department shall have the authority to remove a City tree based upon the following conditions:

Hazardous Trees. The Community Services Department shall identify hazardous trees based on the severity of the following signs of decline:

- Large dead branches in the tree
- Cavities or rotten wood along the trunk or in major branches
- Mushrooms present at the base of the tree
- Cracks or splits in the trunk or where branches are attached
- Strong lean at the trunk
- Many major branches arise from one point on the trunk
- Damaged, broken, or injured roots
- Tree has been topped or otherwise heavily pruned

Dead Trees. Street and park trees that are dead or have been determined by an ISA Certified Arborist to be in a state of severe decline, although perhaps not an immediate hazard, shall be removed. Due to their wildlife habitat value, dead and dying trees located in City-owned open space or natural areas shall not be removed unless they pose an immediate hazard or other reasons warrant their removal.

Emergency Removals. Healthy trees may be removed if the City of Claremont decides an emergency condition exists, and tree removal is determined to be the only option available.

Public Safety. Healthy trees may be removed if the Community Services Department decides that a public safety concern exists, and the tree removal is determined to be the only option available.

Other Removals. Other examples where a condition shall warrant removal include

- **Diseased/Insect Infested Trees.** The tree is diseased, has lost its productive capacity, and is not likely to recover despite the application of available remedies. Trees that acquire an infectious disease or are infested with an insect that is declared to be a serious pest threat to other nearby trees shall be removed, if removal is determined to be the best pest control solution.
- **Building Damage.** If a tree is causing structural damage to a building, and the condition cannot be corrected without removing the tree.
- **Hardscape/Infrastructure Damage.** If hardscape/infrastructure repairs cannot be completed without severe root pruning which would jeopardize the health and stability of the tree, the tree may be removed only after all mitigation measures have been considered. If the planting site is still considered viable, all hardscape must be repaired and/or installed prior to replanting a new tree.

Hardscape Installation Guidelines on Public Property. The general policy that shall be observed when repairing or replacing hardscape adjacent to a City tree is that the health and integrity of the tree take precedent over the installation of concrete or asphalt. Every effort shall be made to protect the tree from root or trunk damage.

Several alternatives are available for accommodating the installation of new hardscape without severely infringing upon a tree's root system. Any hardscape installation that may involve the removal of an extensive portion of a tree's root system, or may require the removal of one or more roots that are of a diameter greater than three (3") inches, shall first be evaluated by the ISA Certified Arborist. If it is determined by the ISA Certified Arborist that the removal of the

offending roots might jeopardize the health or integrity of the tree, then one of the following alternatives should be considered:

Off-set. An off-set is the tapering or reduction of a sidewalk's size down to a width no less than forty-two (42") inches.

Ramping. A sidewalk may be constructed to ramp over offending roots, as long as the 'slope of the grade does not exceed one (1') foot of elevation change within a span of twelve (12') linear feet.

Reconfiguration. Sidewalks do not need to be constructed in a straight line. If the public easement can accommodate it, a sidewalk may be reconfigured to curve around a tree in a suitable manner. In some cases, the property owner may wish to extend the easement over their property to accommodate the installation of sidewalk without removing a tree.

Any root removal that occurs while completing hardscape installation shall conform with the Root Pruning specifications detailed in this manual.

Hardscape Installation Guidelines on Private Property

The same general policy for hardscape installation on public property shall be applied to private property. Every effort shall be made to protect the tree from root or trunk damage. To mitigate future hardscape damage, hardscape on private property shall not be installed within three (3') feet of the base of a City tree. The installation of root barrier is another a means to mitigate future root intrusion.

Programmed Tree Removal and Replacement Program: In an effort to minimize deforestation, a programmed removal and replacement program may be proposed by the Community Services Director or his/her designee. When considering a Tree Removal and Replacement Program, the severity of the following shall be evaluated:

- Neighborhood impacts
- Grow space
- Species
- Age of trees
- Condition of trees
- Cost to repair hardscape damage
- Severity and frequency of reoccurring hardscape damage.

This programmed removal may, wherever possible, be scheduled for completion over multiple years, by removing alternating trees avoiding neighborhood deforestation and maintain age diversity. Any plan proposed for phased removal of trees in a defined area must be specifically crafted to meet the needs of the particular area. Such a proposal must be presented to affected residents at a noticed workshop. In addition,

programmed Tree Removal and Replacement Programs must be reviewed by the Tree Committee and Community and Human Services Commission and approved by the City Council prior to implementation.

Reasons that are NOT Valid for Tree Removal:

- Leaves getting into gutters or a nuisance to remove.
- Messy fruit.
- Nuisances created from non-lethal pests and diseases.
- Roots getting into the sewer lines as a result of deteriorating infrastructure.
- Hardscape damage if a feasible, economic solution exists to save the tree.

City trees and Solar Panels. The City complies with existing solar access regulations in the State of California, including The Solar Rights Act (AB3250) and The Solar Shade Act (AB2321). The Solar Shade Act prohibits shading of solar collectors that result from tree growth occurring after a solar collector is installed. It states that no plant may be placed or allowed to grow such that it shades a collector more than 10% from 10 am to 2 pm. It does not apply to plants already in place or replacement of plants that die after the installation of the solar collectors.

Unauthorized Trimming and Removal. According to section 12.26.090 of the Claremont Municipal Code, it is unlawful for any person to injure, cut, damage, carve, transplant, prune, root prune, or remove any public tree. Procedures for addressing violations are outlined in section 12.26.110 of the Claremont Municipal Code.

Property Owner Request for Removals. Periodically, property owners approach the City with requests to remove a City tree that is located within the public easement on their property. Community Services staff and the City arborist have the authority to approve these requests only if the tree is dead, in advanced decline, critically diseased, hazardous, or an emergency condition exists, as referenced above; otherwise staff will deny the request. Property owners may appeal the staff denial by written request, which shall be brought before the Tree Committee and Community and Human Services Commission. Per Municipal Code Section 12.26.020 (B) “the Commission may grant an appeal if it finds that the staff decision would result in a burden on the property owner that substantially outweighs the benefit to the public. The Commission’s decision may be appealed to the City Council if a written appeal, setting forth the grounds, is filed with the City Clerk within ten days of the Commission decision. If no timely appeal is filed, the decision shall be final.”

Community Services staff shall provide all interested parties with information on the committee and commission review process. Any tree removal requests brought forth to

the Tree Committee and Commission shall be evaluated by staff and a certified arborist. The Community and Human Services Commission will evaluate tree removal requests individually, considering any of these factors listed below to determine if tree's removal represents a greater loss to the public that the burden placed on the property owner by its continued existence:

- Species of the tree. Does the tree's species further the City's urban forest management goals?
- Size of the tree. Does the tree's size provide significant value in terms of shade, tree canopy, and neighborhood character?
- Approximate age of the tree. Whether the tree is young, mature, or near the end of its life cycle may be considered.
- Health of the tree. Is the tree in good health or it is showing signs of advanced decline or approaching the end of its life?
- Physical characteristics of the tree. Does the tree have species appropriate structure and form that suggests structural integrity?
- Environmental productivity of the tree. Is the tree believed to be environmentally productive or has productivity likely declined due to age, condition, or poor health?
- Safety of the property owner and general public will be considered. The Commission may consider health and safety impacts for the residents, adjacent property owners, and public at large when evaluating a removal request.
- Asset value of the tree. The value of the tree as listed in the City's inventory shall be included in the information presented to the Commission.
- Utility conflicts, both above and below ground, public or private, may be considered when evaluating a removal request.
- Species and age diversification may be considered to determine if the street would benefit from having a more diverse street tree population to reduce threats of deforestation.

Consistent with previous sections of the Tree Policies, trees may not be approved for removal based on leaves getting into gutters or a nuisance to remove, messy fruit or tree debris, roots getting into the sewer lines as a result of deteriorating infrastructure, hardscape damage if a feasible, economic solution exists to save the tree, or if a City tree is blocking solar panels.

If a property owner requests a tree removal and the request is approved by the Community and Human Services Commission, the property owner will be required to pay for the subsequent removal and the replanting of two replacement City trees. This practice is intended to contribute to the growth of the City's urban forest. Information regarding this requirement will be made available to the property owner prior to the commission process. Costs will be determined based upon the City's current contract rates for removal and planting. A viable planting site for the replacement tree will be determined by the City's arborist. The accepted planting site may or may not be adjacent to the removed tree or on the same property. Property owners may appeal the

requirement to pay for the requested removal and replanting two replacement trees if they are able to demonstrate financial hardship.

Resident/Merchant Notification. In an effort to encourage public participation, City staff will post a notice on the affected tree no less than 72 hours prior to review by the Tree Committee and Community and Human Services Commission. The notice will include information on the proposed removal/property owner appeal and meeting dates, times, and locations. Agendas for Tree Committee and Community and Human Services Commission meetings will be posted a minimum of 72 hours prior to the meeting date for public review. Interested residents/merchants are invited to make public comment at the meetings or submit written comments for consideration.

The Community Services Department may or may not be able to notify the public of emergency and hazardous tree removals due to the degree of urgency during these events. A list of newly planted and removed trees will be brought to the Community and Human Services Commission on a monthly basis as a receive and file item for information purposes.

Open Space

Portions of the urban forest that abut open space will meet or exceed the Los Angeles County fire clearance standards. The City also maintains open space that abuts properties in accordance with the Los Angeles County Department of Agriculture Commissioner/Weights and Measures annual weed abatement and brush clearance standards. This includes clearance of brush, dry weeds, or dry vegetation within 100 feet up to 200 feet from a home or structure.

CLAIMS

In keeping with the City's policies for protecting and preserving the health and well-being of our community forest while providing for the safety of our citizens, the following guidelines have been established for correcting potentially hazardous situations that result from tree roots disturbing nearby hardscape.

Hardscape Damage Response Procedures

There are several factors that must be considered in determining the course of action necessary for addressing hardscape damage concerns that involve City trees. These actions are driven by the extent of the damages, and whether the damages are located on private or public property.

The Community Services Department shall delegate the initial inspection of all hardscape damage to appropriate staff. If the hardscape concerns include potential damage to private property, the matter shall be referred to the Community Services Department's claim representative for evaluation. A Community Services Department Inspection Checklist is to be used by the claim representative for such tree assessments.

Upon initial inspection of the area, staff must determine what course of action is necessary to respond to the problem. The following are the most commonly occurring hardscape problems, and the courses of action that shall be employed to rectify them:

Public Property

Hardscape damage on sidewalks shall require a temporary asphalt ramp, followed by permanent repair of the area at a later date.

Hardscape damage is on public property other than sidewalks, but the nature of the damages cannot be rectified by temporary measures. Thus, areas in need of permanent repair shall be immediately placed on the repair schedule based upon the potential the damages have for creating a public safety hazard.

Private Property

- Hardscape damage is on private property and thereby cannot be addressed by City crews. However, there are clear-cut indications that at least some of the damage has occurred as a direct result of a City tree. Thus, the property owner may have reason to file a claim for damages with the City Clerk.

If the property owner does elect to file a claim, the Community Services Department and/or an ISA Certified Arborist shall be responsible for evaluating

the damaged area and submitting a Tree Assessment Report to the City Clerk for inclusion with the claim file.

- Hardscape damage is on private property and thereby cannot be addressed by City crews. When no clear-cut indications exist that a City tree is the source of the damages, the property owner shall be responsible for excavation of the damaged area for the purpose of exposing any invasive roots, should they wish to file a claim for damages with the City.

Upon excavation of the area, it is the property owner's responsibility to contact the Community Services Department and schedule an evaluation and assessment of the damage. The Community Services Department shall be responsible for submitting this assessment report to the City Clerk for inclusion with the property owner's claim.

- Hardscape damage is on private property and is clearly not caused by a City-owned street tree; therefore, the City is not responsible for damages or repairs.

Once a course of action has been determined, staff shall be responsible for providing written notification to the City Clerk's office informing them of the findings and the measures needed to rectify the problem.

TREE DONATIONS

The Community Services Department shall make available to interested property owners, residents and others the City's Gift Policy to encourage the donation of funds or trees to enhance the community forest. All donations of trees to the City must meet certain qualifications and restrictions set by the Community Services Department. Likewise, the department must follow certain procedures in the receiving of such gifts.

All tree donations shall be accepted only under the terms stated in Administrative Policy 10-12.

Trees may be donated to the City for planting in City parks or within City rights-of-way. The City shall make every effort to have the tree planted where the donor wishes but may not always be able to plant a certain tree in a certain place.

Standard Tree Donations

Standard tree donations may be in the form of monetary gifts funded specifically for the purchase and planting of a tree, or the donation may be a tree itself pending approval by the Community Services Department.

The general amount necessary for a monetary tree donation gift must cover the current average cost for a 15-gallon containerized tree with a trunk caliper of one- and one-half inches (1.5"), or greater, all necessary planting materials, as well as the labor costs involved in planting the tree. The current average cost for tree planting shall be determined by the ISA Certified Arborist and approved by the Director of Community Services.

All donated trees shall be approved by the ISA Certified Arborist only after the proposed tree and location have been reviewed in light of the Designated Street Tree List and the Nursery Stock Standards described in this manual.

Tree donations valued at less than \$500 shall be approved by the Director of Community Services. Tree donations valued at more than \$500 are subject to review by the Community and Human Services Commission, unless specifically waived by the City Manager. The City Manager shall make the final determination.

It is the responsibility of the Community Services Department to complete a proposed "Gift to the City" form for all tree donations, including acquiring necessary donor information and signatures. The completed original form shall be forwarded to the City's Finance Department. One copy of the completed form shall be returned to the donor, and one copy shall be retained by the Community Services Department.

Acceptance of donations implies no reciprocal agreement or obligation to the donor by the City other than designation of donated funds for specific tree gifts. Any tree

accepted by the City becomes the property of the City and shall be subject to all the policies described in this manual.

It shall be the responsibility of the Director of Community Services to convey acceptance or non-acceptance of tree gifts to the donor within two weeks. If a donation requires lengthy review and approval, the donor shall be notified of such proceedings.

Recognition may be made to the donor through media coverage or other appropriate activities only with the consent of the donor.

Oak Park Cemetery Memorial Tree Program

The Oak Park Cemetery Memorial Tree Program is a donation program limited to the planting of trees on the grounds of the City's Oak Park Cemetery. Interested donors will be given a Memorial Tree Program application form informing them of the procedures, prices, species of trees, and locations available for their donation. Memorial tree donations shall be subject to the same conditions as standard tree donations, with the following amendments.

Memorial tree donations should generally be made through the Friends of Oak Park Cemetery. Location and species of donated trees will be selected by the donor from the list detailed on the reverse side of the application form. The tree list is subject to revision depending upon the availability of space in each cemetery quadrant. The donor's selections shall be reviewed by the City Arborist, prior to approval.

The Friends of Oak Park Cemetery shall be responsible for providing to the donor a certificate acknowledging the gift.

The Oak Park Cemetery Memorial Tree Program is temporarily suspended pending future development.

Plaques

The City does not allow the permanent installation of plaques for donated trees. However, the City Council may approve permanent plaques in situations where it is determined that the plaque would be of benefit to the community.

PERMITS

Section 12.26.070 of the Claremont Municipal Code (Appendix A) sets the conditions for the acquisition of a permit for any work involving City trees. No person shall plant or otherwise disturb any City tree without first obtaining a permit from the Community Services Department.

Applications for permits must be made to the Community Services Department on forms provided by the department and shall include such information as the Director of Community Services deems necessary to review the application. The tree permit form is available on the City website at www.ca.claremont.ca.us/trees.

Any business wishing to acquire a permit for tree planting must provide an official copy of a current City of Claremont Business License at the time of application.

The Community Services Department shall issue the permit if the proposed work is desirable and the proposed method and workmanship are performed to the standards defined under the Maintenance Guidelines described in this manual. Any permit granted shall contain a date of expiration and the work shall be completed in the time allowed on the permit and in the manner described in it. A permit shall be null and void if its terms are violated.

Permittees shall be required to have a copy of the permit, and a current Claremont Business License (if applicable), present at all times at the work site. Work undertaken by the permittee or their agents may be stopped immediately and the permittee's permit may be revoked by oral or written order of Director of Community Services if it is determined that the program of work or conditions outlined in the permit are not being complied with.

As described in Section 12.26.080 of the Claremont Municipal Code, any fees for permits shall be established by resolution of the City Council.

CONSTRUCTION MANAGEMENT

Section 12.26.090 of the Claremont Municipal Code (Appendix A) and Section 435 of the Land Use and Development Code prescribe protections for pre-existing or native trees that may be impacted by new development in the City.

Construction damage associated with new development taking place around existing trees can be detrimental to those trees in a number of ways. The following construction specifications shall be observed to preserve and protect existing or native trees located on a site that is planned for development.

General Site Evaluation. As part of the environmental review for a location planned for development, the Community Development Department shall consult the Community Services Department on the appropriate measures to take regarding trees existing on the project site. Community Services and Community Development staff are to identify which trees to remove and develop an appropriate mitigation plan. In addition, staff shall develop a plan to protect all trees that are to remain. Department staff shall also examine site access and traffic route considerations, excavation limitations, appropriate locations for the piling of soil and debris, and the storage of equipment and vehicles as each of these activities pertain to trees on the project site.

Protective Fencing. Temporary, protective fencing shall be installed around any existing tree that is to be preserved on a project site. This fencing must be made of a material that has high visibility, such as fluorescent-colored, and must be posted at regular intervals around the tree. This fencing shall be placed at a minimum distance of fifteen (15') feet from the trunk of the tree or five (5') feet outside the drip line of the tree, whichever distance is greater. No activity shall take place within this fenced in area.

Construction Mulching. If department staff determines that traffic encroachment within the drip line of a preserved tree is unavoidable, then a six (6") to twelve (12") inch layer of temporary mulch shall be placed over the affected area to disperse the weight of traffic and equipment. Additional weight dispersal and mobility may require the placement of large plywood sheets over the mulched area. Construction mulching and plywood must be removed carefully, so as not to damage the tree, as soon as the required activity within the drip line of the tree has been completed.

Excavation Requirements. Whenever possible, services such as water lines and utilities shall be routed around the drip line of trees that are being preserved on a site. If department staff determines that excavation within the drip line of a preserved tree is unavoidable, then every effort shall be made to tunnel under or through the tree's root system with a minimal amount of pruning, rather than to trench across the tree's roots.

All root pruning shall be in accordance with the Maintenance Guidelines established for such activity in this manual.

Grade Changes. A change of grade around a tree, even well outside of a tree's root zone, can have serious impact on the tree due to reduced aeration or poor drainage.

Department staff shall recommend that development specifications include requirements for mitigating such impacts to trees that are to be preserved on a project site based upon the type of grade changes that are to be implemented, tree species, drainage patterns, soil conditions and future irrigation and maintenance plans.

Department staff shall employ the following mitigation measures whenever feasible:

Raised Grades. If a grade around an existing tree is to be raised with a backfill less than six (6") inches in depth, then department staff should consider vertical mulching as a mitigation measure. If a grade around an existing tree is to be raised more than six (6") inches, then department staff should consider specifying the construction of a tree well as a mitigation measure.

Lowered Grades. If a grade around an existing tree is to be lowered along the side of its root zone, then department staff should consider specifying the construction of a terraced dry wall as a mitigation measure. If a grade around an existing tree is to be lowered along all sides of its root zone, then department staff should consider specifying the construction of a tree island as a mitigation measure.

GLOSSARY

For the purpose of this manual and the interpretation of regulations, the following definitions shall apply:

ANSI Z133.1: The Section of American National Standards which defines safety requirements for pruning, trimming, repairing, maintaining, and removing trees; for cutting brush; and for the use of equipment in such operations.

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

Branch Collar: Trunk tissue that forms around the base of a branch between the main stem and the branch or a branch and a lateral. As a branch decreases in vigor or begins to die, the collar usually becomes more pronounced and more completely encircles the branch.

Branch Bark Ridge: A ridge of bark in a branch that marks where branch and trunk tissues meet and often extend down the trunk.

Callus: Undifferentiated tissue initially formed by the cambium around and over the wound.

Co-dominant Stem: Branches or stems arising from a common junction, having nearly the same size diameter.

Crotch: The angle formed at the attachment between a branch and another branch, leader or trunk of a woody plant.

Crown: The leaves and branches of a tree or shrub; the upper portion of a tree from the lowest branches on the trunk to the top.

DBH: The Diameter at Breast Height as measured at 54 inches above the ground is the standard measurement of tree size used by arborists.

Dead Tree: A tree that is dead, damaged beyond repair, or is in an advanced state of decline as determined by an ISA Certified Arborist.

Diseased Tree: A tree that is inundated with a persistent disease that is known to cause tree mortality as determined by an ISA Certified Arborist.

Disturbance: All of the various activities from construction or development that may damage trees.

Drip Line Area: The suggested minimum area within X distance from the trunk of a tree in a typical location, measured from the perimeter of the trunk of the tree at 54 inches above natural grade, where X equals a distance ten times the diameter of the trunk at 54 inches above natural grade, or the distance to the outermost edge of the tree canopy, whichever is the lesser distance.

Excessive Pruning: Removing in excess of 25 percent of the functioning leaves and stems. Excessive pruning may include the cutting of any root two inches or greater in diameter. Exceptions are when clearance from overhead utilities or public improvements is required, or to abate a hazardous condition or a public nuisance.

Hazardous Tree: a tree that is an imminent threat to the safety of persons or property. If a tree possesses a structural defect that may cause the tree or part of the tree to fall on someone or something of value, and the condition is determined to be imminent, the tree is considered hazardous.

Heading Back: See Topping

Injury: A wound resulting from any activity, including but not limited to excessive pruning, cutting, trenching, excavating, altering the grade, paving or compaction. Injury shall include bruising, scarring, tearing or breaking of roots, bark, trunk, branches or foliage, herbicide or poisoning, or any other action leading to the death or permanent damage to tree health.

ISA: The International Society of Arboriculture is a professional association of arborists and tree workers recognized internationally as one of the leading agencies in the research and establishment of high standards for all aspects of tree care.

ISA-Certified Arborist: A person who has demonstrated knowledge and competence obtaining the International Society of Arboriculture (ISA) “Certified Arborist” certification.

Lateral: A branch or twig growing from a parent branch or stem.

Leader: A dominant upright stem, usually the main trunk.

Lion-tailing: Lion-tailing is the over-pruning of a tree by removing a large number of the inner branches. The resulting tree limbs will appear “long and slender” with a “puff” of foliage at the end like a lion’s tail. Lion-tailing increases the risk of branch failure by weakening the tree’s root system and eliminating the dampening effect which interior limbs provide when branches flex and bend during storms.

Neighborhood Deforestation: The rapid removal of trees from a street of neighborhood which changes the character of the street of neighborhood.

Parent Branch or Stem: The tree trunk, or a larger limb from which lateral branches are growing.

Pollarding: A destructive pruning technique in which the upper branches of a tree are removed to create a dense head of branches and foliage. This is common in European urban areas to maintain trees at a predetermined height, rather than allowing them to assume their normal and natural size and shape.

Root Ball: The mass of roots growing from the trunk of a tree, including the surrounding soil.

Root Collar: The junction between the root of a plant and its stem, often indicated by a trunk flare.

Rounding Over: See Topping

Stubbing: See Topping

TCIA: The Tree Care Industry Association, formerly the National Arborist Association, is a professional trade association whose chief purpose is to raise the standards of the tree care industry and provide useful service to the public.

Topping: Topping is perhaps the most harmful tree pruning practice. Topping is the indiscriminate cutting of tree branches to stubs or lateral branches that are not large enough to assume the terminal role. Topping is detrimental to the tree's overall health and stability and to its appearance. Other names for topping include "heading", "heading back", "stubbing", "tipping", "hat-racking", and "rounding over".

Trenching: Any excavation to provide irrigation, install foundations, utility lines, services, pipe, drainage or other property improvements below grade.

UAA: The Utility Arborist Association is a professional trade association whose chief purpose is to raise the standards of utility line clearance, while providing the safest conditions possible for line-clearance workers.

Wound: An opening that is created when the tree's protective bark is penetrated, cut, or removed, injuring or destroying living tissue. Pruning a live branch creates a wound, even when the cut is properly made.

Wound Wood: Differentiated woody tissue, also referred to as a callus roll, which forms after callus has formed around the margins of a wound. Wounds are closed primarily by wound wood.

APPENDICES

Appendix A - Chapter 12.26 of the Claremont Municipal Code

Appendix B - Heritage Tree and Historic Grove List

Appendix C - Designated Street Tree List (Proposed Revision May 2020)

Appendix A

Chapter 12.26 of the Claremont Municipal Code

The Claremont Municipal Code Chapter 12.26 provided below is from May 2020. The most current version can be found on the City website at www.ci.claremont.ca.us/government/municipal-code

Chapter 12.26

CITY TREES

Sections:

- 12.26.010 Definitions.
- 12.26.020 Duties of Community and Human Services Commission.
- 12.26.030 Duties of Director of Community Services.
- 12.26.040 Duties of private property owners.
- 12.26.050 Street trees.
- 12.26.060 Tree planting in subdivisions.
- 12.26.070 Permits.
- 12.26.080 Fees.
- 12.26.090 Protection of City trees.
- 12.26.100 Interference with Director of Community Services.
- 12.26.110 Violation-Penalty.

12.26.010 Definitions.

The following definitions shall apply to this chapter.

- A. "Compaction" is the compression of the soil structure or texture by any means that creates an upper layer that is impermeable.
- B. "Designated Street Tree List" means a list of specific tree species which have been designated by the Community and Human Services Commission for each City street, or part of it, as the species of tree to be planted and maintained within the City easement of that street.
- C. "Director" means the Director of the Community Services Department or his/her designee.
- D. "Drip Line Area" means the suggested minimum area within X distance from the trunk of a tree in a typical location, measured from the perimeter of the trunk of the tree at 54 inches above natural grade, where X equals a distance ten times the diameter of the trunk at 54 inches above natural grade, or the distance to the outermost edge of the tree canopy, whichever is the lesser distance.
- E. "Easement," "Parkway" or "Right-of-Way" means land owned by another over which the City has an easement or right-of-way for street and related purposes. "Parkway" refers to that portion of a street right-of-way, which is available for landscaping, and not for curb, gutter or pavement.
- F. "Heritage Trees" are any trees within the City's easement or on City-owned property which have been found to be of significance to the community or of notable historic interest and are so designated by action of the Community and Human Services Commission.
- G. "Maintain" or "Maintenance" means and includes root pruning, trimming, spraying, watering, fertilizing, mulching, treating for disease or injury, or any other similar act, which promotes growth, health, beauty and life of any tree.
- H. "Pruning," "Trimming" or "Thinning" means to reduce the size of a tree using professionally accepted standards, as established by the International Society of

Arboriculture (ISA), Tree Care Industry Association (TCIA) or American National Standards Institute (ANSI) Section A300, to control the height and spread of a tree, lessen the wind resistance, preserve its health and natural appearance, produce fuller branching and shaping, aid in disease prevention by allowing more light and air passage within the branches, or make adjustments which will increase its longevity in an urban environment.

I. "Public Tree" or "City Tree" means any tree which is located within any public park, City easement, or on any other City-owned property.

J. "Topping," "Heading Back," "Stubbing" or "Pollarding" means a severe type of pruning which usually produces less desirable results than more moderate pruning with respect to the tree's natural form and which is generally hazardous to the overall health and stability of the tree.

K. "Tree Policy Manual" means a document prepared by the Community Services Division which states policies (approved by the City Council), procedures and other relevant information regarding the selection, planting, maintenance and removal of all City trees.

L. "Urban Forest" or "Urban Forestry" means the ecology of native and nonindigenous plantings creating a forest in the human living environment, and emphasizing the practice of wise, professional, planned management of all tree resources within an urban area for multiple use and benefit of the entire community. (07-04)

12.26.020 Duties of Community and Human Services Commission.

The Community and Human Services Commission serves as the City's tree advisory board. The commission shall:

A. Study the problems and determine the needs of the City in connection with its tree planting and maintenance programs; establish and revise the designated street tree list; and hold discussions of tree-related issues at public meetings.

B. Hear and determine appeals from staff decisions regarding street tree removal. The commission may grant an appeal if it finds that the staff decision would result in a burden on the property owner that substantially outweighs the benefit to the public. The commission's decision may be appealed to the City Council if a written appeal, setting forth the grounds, is filed with the City Clerk within ten days of the commission decision. If no timely appeal is filed, the decision shall be final. (07-04)

12.26.030 Duties of Director of Community Services.

The powers and duties of the Director of Community Services, or his or her designee, under this chapter are as follows:

A. To designate a particular place within the City easement or on any City-owned property where a City tree will be planted.

B. To recommend to the Community and Human Services Commission any changes or additions to the designated street tree list.

C. To draft a tree policy manual that states policies and procedures concerning the selection, planting, maintenance and removal of trees in public places to promote a viable urban forest.

D. To grant or deny the issuance of permits in accordance with the terms of this chapter. (07-04)

12.26.040 Duties of private property owners.

The duties of any owner of private property whose property has a City easement on its for street purposes are as follows:

A. To accept, protect and provide adequate water to any City tree planted in the public easement over his or her property, and not to interfere with the City's provision of water to such trees, whether by water truck or other means;

B. To notify the Community Services Division of any suspected tree hazards or maintenance needs of any City tree on his or her property. (07-04)

C. To remove any vines from City street trees planted in the easement over his or her property; (09-06)

D. To remove all fallen leaves and other deadfall from any City tree planted in the public easement over his or her property, and to properly dispose of the deadfall in an appropriate waste receptacle. (09-06)

12.26.050 Street trees.

No tree shall be planted within a parkway other than the species designated as the street tree for that particular street, or portion of a street, by the Community and Human Services Commission. No street tree shall be planted, except by the City, until a tree permit has been issued for it as provided in Chapter 12.26.070 of this chapter. (07-04)

12.26.060 Tree planting in subdivisions.

Any subdivider of land shall install City trees in accordance with the requirements of Title 16 of this code and any related resolutions. (07-04)

12.26.070 Permits.

A. No person shall plant or otherwise disturb any City tree without first obtaining a permit from the Director of Community Services.

B. Applications for permits must be made to the Community Services Division on forms provided by the division, and shall include such information as the director deems necessary to review the application.

C. Work undertaken by the permittee or his or her agents may be stopped immediately and the permittee's permit may be revoked by oral or written order of the director when the director determines that the program of work or conditions outlined in the permit are not being complied with.

D. The director's decision may be appealed to the Community and Human Services Commission if a written appeal, setting forth the grounds, is filed with the Community Services Division within ten days of the director's decision. If no timely appeal is filed, the decision shall be final. (07-04)

12.26.080 Fees.

Fees for permits and appeals shall be established by resolution of the city council. Any previously adopted resolution establishing fees in relation to prohibited activities shall be repealed. (07-04)

12.26.090 Protection of City trees.

A. It is unlawful for any person to injure, cut, damage, carve, transplant, prune, root prune or remove any public tree. (07-04)

B. It is unlawful for any person to attach, cause to be attached or keep attached to any public tree, or to the guard or stake of a public tree, any rope, wire nails, tacks, staples, advertising posters, decorations, ornaments, flags, toys, swings, lights or any other contrivance whatsoever without first obtaining a permit or explicit approval from the City. (09-06)

C. It is unlawful for any person to cause or allow any poison or other substance harmful to tree life to lie, leak, pour, flow or drip upon or into the soil within the drip line of any public tree; or set fire or permit any fire to burn when such fire or heat thereof will injure any portion of any public tree; or to operate any equipment, such as mechanical weeding devices, in such a manner as to cause damage to a public tree in any way. (07-04)

D. No person shall injure any public tree located within an easement or public right-of-way on his or her private property by neglecting to provide the necessary amount of water, as determined by the Tree Policy Manual and the terms of this chapter, required for said tree's continued good health and viability. (07-04)

E. No person shall impact the drip line area of a City tree in a way that may reasonably be expected to damage the root system, compact the soil over the roots, or impede free passage of water, air or fertilizer to the roots of any public tree. (07-04)

F. Special consideration shall be afforded public trees determined by the Community and Human Services Commission to be heritage trees. Such trees shall be removed only when public interest served by removal outweighs the interest in preservation and heritage status. (07-04)

G. All trees of any species or variety of the genus *Ulmus* which are found to be infected with *Ceratocystis ulmi* (Dutch Elm disease) in the city are a threat and a hazard to all trees of the genus *Ulmus* in Claremont. This section requires that all aboveground portions of such infected trees be destroyed or properly disposed of as provided in this chapter. (07-04)

H. No person shall possess, store or transport into the City all or any part of the trees of the genus *Ulmus* infected with *Ceratocystis ulmi* (Dutch Elm disease); provided, however, that wood, branches and roots of such trees may be transported either to a safe place for burning or burial, under a minimum of two feet of earth, within five days following the discovery of such infection, or to such sites, and under such conditions, as are approved by the Community and Human Services Commission for the processing and subsequent elimination of the disease hazard. Infected trees may be treated in a manner approved by the county agriculture commissioner to affect a cure for the disease if and when an effective cure becomes known. (07-04)

I. During the construction, repair, alteration, moving or removal of any building, structure of any other type of construction in the City, no person in control of such work



shall leave any public tree, shrub or plant in the vicinity of such activity without sufficient guards or protectors as identified in the tree policy manual to prevent injury to the tree, shrub or plant in connection with such construction, repair, alteration, moving or removal. The costs of any such protection shall be borne by the person responsible for the improvement. (07-04)

Interference with director of community services.

No person shall hinder, prevent, delay or interfere with the director or any of his or her agents while engaged in carrying out the execution or enforcement of this chapter. Provided, however, that nothing in this section shall be construed as an attempt to inhibit the pursuit of any remedy, legal or equitable, in any court of competent jurisdiction for the protection of property rights by the owner of any property within the City. (07-04)

12.26.110 Violation-Penalty.

- A. Any violation of this chapter shall be a misdemeanor or infraction at the discretion of the city attorney or district attorney.
- B. Irrespective of and cumulative to any criminal conviction for a violation of this chapter, the City may, pursuant to Government Code Section 36901, impose a civil penalty in an amount not exceeding one thousand dollars on any person who commits a violation of this chapter. The City may recover the penalty either through an administrative hearing or a civil action brought either by the city attorney or a designated employee of the City.
- C. Irrespective of whether the City pursues criminal and/or civil action under this chapter, nothing in this chapter shall prevent the City from seeking restitution for damage to City property as an alternative to criminal action and/or civil action to recover a civil penalty in accordance with subsection (B) of this section. (07-04)

Appendix B

Heritage Tree and Historic Grove List

Heritage Tree List

Address and Number	Botanical Name	Common Name
1105 N. College Avenue (F4)	<i>Sequoiadendron giganteum</i>	Giant sequoia
Mallows Park (F20)	<i>Leptospermum leavigatum</i>	Australian Tea Tree (removed 2016)
201 W. Eleventh Street (S-2)	<i>Pinus halepensis</i>	Aleppo pine
1101 N. Indian Hill Boulevard	<i>Cedrus deodara</i> (private tree)	Deodar cedar
Memorial Park (P-94)	<i>Cinnamomum camphora</i>	Camphor tree
1102 N. College Avenue (S-3)	<i>Eucalyptus robusta</i>	Swamp Mahogany

Historic Grove List

Location and Number	Botanical Name	Common Name
353 – 357 W. Eleventh Street (F1, F1, F1)	<i>Quercus agrifolia</i>	Coast live oaks
N. Indian Hill Boulevard (from Harrison Avenue to Foothill Boulevard)	<i>Ulmus americana</i>	American elms
N. College Avenue (from First Street to Sixth Street)	<i>Eucalyptus</i> spp.	Various species

The Heritage Tree List reflects the current inventory information of each tree. Heritage trees have not changed, rather their inventory identifiers have changed.

Appendix C

Designated Street Tree List

A revision to the Designated Street Tree List is up for recommendation. Once approved it will be included here.

City of Claremont

Tree Policies and Guidelines Manual



Community Services Department
(909) 399-5431

Adopted: February 1997
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INTRODUCTION

Statement of Commitment

Claremont is a community which recognizes its trees as one of its most valuable resources. For this reason, the City has dedicated itself to the preservation, proper maintenance, and continued enhancement of our community forest.

The over 25,100 City street and park trees throughout Claremont are a community asset valued at more than 95 million dollars. The community forest provides environmental benefits, adds to property values, and contributes to an enhanced quality of life for all of Claremont's residents. Trees also represent a significant facet of our community heritage, playing a central role in the history of the City. The City had a Tree Committee even before it had a formal City Council. These early citizens set a standard of dedication to tree preservation for the enrichment of the community.

There are many benefits to having a healthy, well-maintained community forest, including reducing the urban heat island effect which results from having extensive amounts of unshaded hardscape, conserving energy and reducing cooling costs, significantly increasing property values, slowing down harsh winds, muffling street and traffic noise, and providing shade and overall beauty to our community. Trees improve the environment in which we live by moderating the climate, providing oxygen, filtering out particulate matter from smog-laden air, conserving water, reducing erosion, and harboring wildlife within our urban setting.

The City's policy is to protect and preserve healthy trees whenever possible to maintain the valuable benefits trees provide to the environment and quality of life in Claremont. The benefits of the urban forest must also be balanced with the need to ensure public safety, because at times, trees will come in conflict with the built urban environment. We must evaluate whether tree preservation and public safety are both possible outcomes when trees conflict with infrastructure like traffic signs, sidewalks, or overhead utilities. Additionally, the City must comply with requirements of the Americans with Disabilities Act (ADA) to ensure accessible paths of travel, which takes precedence over tree preservation when trees conflict with ADA compliance and there is no reasonable alternative to resolving the conflict.

The thorough assessment and analysis of the tree condition and the consideration of alternative options to removal is intended to preserve trees as a first option. When a removal of a City tree is recommended, the Tree Policies and Guidelines Manual (Manual) outlines that, all tree and infrastructure conflict resolution methods to preserve the tree have been considered and are either not feasible, or methods do not result in ADA compliance. This process helps ensure that every decision made by the City, whether to preserve or remove a tree, is directed towards the best possible outcome for the community of Claremont.

Unfortunately, our trees suffer from the rigors of urban life, including air pollution,



vandalism, compacted soils, limited growing spaces, and the extremes of the Southern California climate. To overcome such rigorous growing conditions for our City trees and reap the benefits of our most valuable assets, the care of our community forest must be a public/private partnership.

Urban Forest Management Plan

In February 2020, the City Council adopted an Urban Forest Management Plan (UFMP). The UFMP is meant to be a guiding document giving direction on how the urban forest should be enhanced and maintained. It discusses trends and issues that may affect the urban forest and provides a framework to develop a holistic approach to the urban forest program. The plan is a working document that will continually be implemented and monitored over the next 40 years. The Urban Forest Management Plan acts as a long-term guide to the urban forest, while the Tree Policies and Guidelines Manual directs the day-to-day operations of the urban forest management program.

The Tree Policy and Guidelines Manual

This Tree Policy and Guidelines Manual (Manual) defines and illustrates the policies and procedures that shall be utilized by City staff in the management and care of all trees located on City property or within the City's public right-of-way. The following pages document the City of Claremont's official guidelines for the planning, planting, pruning, removal, preservation, and protection of all City-owned trees, herein referred to as Claremont's community forest. These policies shall be based upon the highest nationally accepted standards set for tree care and shall act as the source reference by City staff for the implementation of the duties, authorities and regulations delineated in Chapter 12.26 of the Claremont Municipal Code (Appendix A). The most widely accepted standards for tree care are provided by the American National Standards Institute (ANSI) and the International Society of Arboriculture (ISA). The Southern California Association of Governments (SCAG) provides Climate Resilient Urban Greening Best Practices for urban forestry. ANSI Standards, ISA, and SCAG best management practices are considered throughout the Manual. The most updated version of the Claremont Municipal Code can be found on the City website at www.ci.claremont.ca.us. These policies are established to address the specific needs of Claremont's community forest and shall be followed for all tree care practices for publicly maintained trees.

Guiding Principles

The City shall adhere to the following principles in all its tree-related policies and processes:

- Trees of our urban forest are more than aesthetic enhancements and shall be cared for as a community asset.
- Trees are the backbone of our urban ecosystem by providing habitat for wildlife and are an essential part of our community's green infrastructure.
- Promote the health and growth of our urban forest by following research-backed,



arboricultural best management practices for tree selection, planting, watering, and pruning.

- Promote a robust urban forest through policies and practices that reduce its vulnerability to known diseases or pest infestations, high wind events, and future threats, including the anticipated effects of climate change and demand for future development.
- Engage in a continuous process of long-range planning for the growth and maintenance of our urban forest.
- Balancing the benefits of the urban forest with the safety of the public is a priority of the City.
- Provide educational outreach programs to increase public appreciation of the urban forest with the intent to support local businesses, institutions, organizations, and individuals in their efforts to grow and maintain our urban forest.
- Proceed in a manner that is inclusive to all community members of Claremont by proactively balancing the maintenance of the urban forest while allowing community members to safely live amongst trees.
- Proceed in a manner that is transparent, ensuring tree-related decision-making processes are documented and publicly accessible, allowing for engagement in the tree maintenance program.

Amendments to Policies

These policies shall be reviewed annually. Amendments may be initiated by staff or members of the Tree Committee, Community and Human Services Commission, or City Council. The City Council reserves the right to approve amendments to the policies if it is deemed by majority opinion that such revisions or updates are necessary. Any amendments to these policies sought by other public or private interests shall first receive approval from the City Council.

City Easements and Right-of-Ways

Section 12.26.010 of the Claremont Municipal Code (Appendix A) defines "easement," "parkway," or "right-of-way".

The City retains an established right-of-way or easement on each public street. These easements are City-controlled areas for the purpose of public improvements, including streets, sidewalks, curb and gutters, driveway approaches, streetlights, street signs and street trees.

Easements may vary per street and will usually extend beyond street width. Generally, the width of these parkways or landscape easements are around ten (10) feet from the face of the curb, but this dimension may range from anywhere between one (1) foot and thirty (30) feet. The City Engineer shall keep official record of the City easements.

Any tree located within this public easement is recognized as a City-owned tree and is



subject to the policies described herein and in the Municipal Code (Appendix A), which govern all City trees and public property.

GUARDIANSHIP FOR THE COMMUNITY FOREST

The City Council

The elected officials of the City provide leadership, at the request of the citizens, to ensure that our community trees continue to be a priority in Claremont. They oversee the funds which support the forestation and preservation of the community forest. They also make decisions regarding policies and ordinances which pertain to the care and protection of all trees on public property as well as to the development and enhancement of private property.

The Community and Human Services Commission

Section 12.26.020 of the Claremont Municipal Code (Appendix A) defines the duties of the Community and Human Services Commission.

The commission is made up of City Council appointed citizen representatives, who serve, among other capacities, as the City's tree advisory board. The commission appoints a Tree Committee from its membership on an annual basis and holds regular meetings for the purpose of reviewing tree-related issues and determining the needs of the City with respect to its tree planting, tree removal, and maintenance program. Recommendations related to arboriculture principles and tree maintenance shall be received by the Tree Committee and commission from an International Society of Arboriculture (ISA) Certified Arborist on staff, or an external consultant who is an ISA Certified Arborist. The Tree Committee and commission shall consider the recommendation, hear any public comments related to the topic, and determine if the recommendation will be implemented or if further information is necessary to approve a recommendation. Recommendations received may include, but is not limited to, policies and ordinances, which pertain to the care and protection of public trees and selecting specific species of trees for designation along City streets. As representatives to the community, commissioners also help educate and inform the public on proper tree care and promote the value of trees to the community.

The Community Services Department

The Community Services Department is responsible for providing the daily management and emergency services which sustain our community forest. The department provides forestation and maintenance services and oversees all contracted and permitted work on City trees. The department retains and updates the City's tree inventory and is the primary resource for residents who contact the City with concerns and questions about trees. The department also provides educational materials to the public about proper tree care, information on specific City trees, as well as sponsors City-wide events, such as the annual Arbor Day celebration, to enhance the public's awareness of the important role trees play in the community.

Section 12.26.030 of the Claremont Municipal Code (Appendix A) defines the duties of the Director of Community Services. Under general direction from the Director of



Community Services, department staff, and either a staff member who is an ISA Certified Arborist, or with direction from a third-party ISA Certified Arborist if one is not on staff, shall be responsible for overseeing the care and management of the community forest.

The Property Owners and Residents of Claremont

Section 12.26.040 of the Claremont Municipal Code (Appendix A) defines the duties of the private property owners in the care of public trees.

Tree care responsibilities for the residents of Claremont include protecting the tree from vandalism and providing enough water throughout the establishment period as well as in times of high heat or drought events, to promote the health and vitality of any City tree located within the public easement on their property, and notifying the Community Services Department of any suspected tree hazards or maintenance needs that their City trees may require.



FOUNDATIONS FOR TREE PRESERVATION

The foundations for the preservation and enhancement of our community forest are based upon Claremont's General Plan, Land Use and Development Code, and Municipal Code (Appendix A).

The General Plan

Claremont's General Plan refers to trees in several of its elements. The goal of these tree management policies is to carry out the policies of the plan as follows.

Land Use, Community Character, and Heritage Preservation Element

Community Design Section:

"On-going maintenance and enhancement of Claremont's street trees through implementation of the City's Tree Policy Manual will continue to promote streets as sustainable community "places" that provide shade and contribute to clean air. The City is committed to preserving its existing street trees, replacing trees that are damaged or dying, and expanding community forests in newer areas of Claremont."

Policy 2-13.1: Maintain and enhance the City's collection of street trees and improve Claremont's image of a "City with trees."

Policy 2-12.4: "Encourage all new development to preserve the natural topography of a site and existing mature trees."

Open Space, Parkland, Conservation, and Air Quality Element

Street Trees and Community Forest Section:

"While trees add considerably to the aesthetic quality of Claremont, "community forests" also promote a good community environment and provide biological benefits. They contribute to clean air, provide cooling shade, support wildlife, increase property values, control soil erosion and conserve water, create sound barriers, and provide protection from high winds. The community forest is comprised of a street tree system, trees on parks and other public lands, and trees on private properties and in yards throughout the City. The community forest is distinct within established areas of Claremont where trees have fully matured, particularly in The Village, Historic Claremont, Old Claremont districts, and on The Claremont Colleges' campuses. The City is committed to preserving its existing trees, replacing trees that are damaged or dying, and expanding community forests in newer areas of Claremont."

Policy 5-8.1: "Develop a tree planting policy that strives to accomplish 50% shading of constructed paved and concrete surfaces within five years of construction."

Policy 5-8.2: "Provide adequate funding to manage and maintain the City's urban

forest, including sufficient funds for tree planting, pest control, scheduled pruning, and removal and replacement of dead trees.”

Policy 5-8.3: “Coordinate with local and regional plant experts (e.g. Rancho Santa Ana Botanic Garden) in selecting tree species that respect the natural region in which Claremont is located, to help create a healthier, more sustainable urban forest.”

Policy 5-8.4: “Safeguard and enhance Claremont’s community forest by protecting existing stands of trees and other plant material of substantial value.”

Policy 5-8.5: “Continue to plant new trees (in particular native tree species where appropriate), and work to preserve mature native trees.”

Policy 5-8.6: “Increase the awareness of the benefits of street trees and the community forest through a citywide education effort.”

Policy 5-8.7: “Continue to manage and care for all trees located on City property or within the City’s right of way.”

Policy 5-8.8: “Provide information to the public on correct tree pruning practices.”

Policy 5-8.9: “Encourage residents to properly care for and preserve large and beautiful trees on their own private property.”

Policy 5-18.5: "Continue to require the planting of street trees along City streets and inclusion of trees and landscaping for all development projects to help improve airshed and minimize urban heat island effects."

Measures for Implementation, Streets section, Measure E. "Street trees shall be selected for their adaptability to the City's environmental conditions, visual characteristics, and shading. Deciduous trees shall be used so that shade is provided in summer with open views in winter."

Land Use and Development Code

Chapter 4, Part 1

Section 413.B Yard Landscaping Requirements

“A minimum of one tree per fifty feet of lot width in addition to street trees is encouraged.”

The Claremont Municipal Code

Chapter 12.26 of the Claremont Municipal Code (Appendix A) establishes the duties, authorities and regulations governing all City trees. All of the tree management policies found herein are based upon this ordinance. The purpose of these policies is to implement this section of the Municipal Code (Appendix A).



GENERAL PRESERVATION AND PLANNED MANAGEMENT

One of the most important aspects of preserving Claremont's community forest is the ability to retain a manageable population in terms of species diversity, density, and climate appropriateness. The City shall achieve this through proper planning with consideration to current urban forestry research, and gradually replacing species predicted to fare poorly in anticipated future climates, rather than through drastic deforestation and replacement measures, whenever possible. No healthy, living tree shall be removed for the sole purpose of altering an area's existing tree species composition.

Species Diversification and Density

A diversified population of tree species helps to guard against the negative impacts of monocultures. Monocultures, large populations of a single tree species, may be ravaged during insect or disease epidemics. On the other hand, too diversified a population may create an unmanageable inventory of trees. Thus, as a means of controlling species vicissitude, it shall be the goal of the City to retain a population of trees in which the optimum quantity of a single tree species shall make up between .5 and 5 percent of the total tree population, and that no single tree genus shall exceed 12 percent of that population.

Current best management practices (BMPs) for species diversity standards in public tree inventories recommend a representation of no more than 10% of any one species, 20% of any one genus, or 30% of any one family. Guidelines provided in this Manual are used for planning a more resilient community forest.

Heritage Trees and Historic Grove Preservation

Specific trees, which by virtue of their species, size, age, appearance or historical significance are determined to be outstanding, shall be protected by declaration of Heritage Tree status, and shall so be protected by ordinance. Sections 12.26.010 and 12.26.090 of the Claremont Municipal Code (Appendix A) defines "Heritage Trees" and the protection criteria established for them.

Historic groves of a particular species in a specific area, such as the American Elms along Indian Hill Boulevard and the Eucalyptus trees along College Avenue, shall also be afforded the same protective status as Heritage Trees.

Historic groves are vulnerable to large-scale loss if a pest or pathogen targeting the species enters the community forest. In some instances, a Historic Grove may consist of trees that are no longer recommended to be planted in Claremont as they are not expected to be adapted to future climate conditions or deemed not appropriate for the site. In these instances, tree species which differ from, but that complement the historic grove and neighborhood characteristics, shall be planted to increase species diversity and resilience of the community forest.

All nominations for Heritage Tree or historic grove candidates shall first be reviewed and



approved by the Community and Human Services Commission. The Community Services Department shall retain a detailed inventory record of all Heritage Trees. A copy of the Heritage Tree and Historic Grove List is included in the Appendix B of this manual.

The City shall encourage property owners to consider nominating large trees on private property as candidates for Heritage Tree status. To be considered a Heritage Tree on private property, the tree must be visible from publicly accessible location(s).

Claremont's Designated Street Tree List

Claremont's tree population management plan shall be based primarily upon the City's Designated Street Tree List. Section 12.26.010 of the Claremont Municipal Code (Appendix C) defines and authorizes the creation and implementation of this list. A copy of the Designated Street Tree List is included in the Appendix C of this manual.

The Designated Street Tree List identifies several tree species designated for each City Street, including drought-tolerant varieties. Multiple species are identified to increase species diversification, prevent deforestation related to pests and disease, and minimize the negative impacts of species monocultures. Selecting the appropriate species for locations where there are overhead clearance conflicts or grow space limitations, ensures the right tree is planted in the right place and allows the tree to grow to maturity while minimizing conflicts that may necessitate consideration for removal.

Each street shall be assessed to provide a selection of designated species based on site-specific evaluation and street site conditions with a goal to plant trees that maximize the available space and take into consideration the public infrastructure such as bike lanes and/or parkway conditions. Appropriate tree species shall be selected for designation based upon the following criteria and shall be noted in the species list to allow for an informed decision-making process:

- **Mature tree stature.** Trees are categorized into small-, medium-, and large-stature trees to allow for "right tree, right place" planting. Large stature trees will be prioritized as they provide more benefits per tree to the community than smaller stature trees.
- **Species hardiness.** Based upon the trees' adaptability to the region in terms of its resistance to adverse growing conditions, namely frost or freezing temperatures.
- **Growspace.** The amount of parkway space or vegetated area available relative to the expected tree trunk circumference and root flare at maturity.
- **Overhead clearance.** The potential for conflicts between the tree's canopy and overhead obstructions, such as utility lines, at the tree's mature height.
- **Character and basic design plan for the neighborhood.** The general compatibility between the tree and its location; e.g., an eighty foot tall tree may not be appropriate in a neighborhood of small, single story homes.
- **Pest and disease resistance.** Species known for having a lack of significant pest or disease problems or resilience against prominent pests or diseases are preferred.



- **Water Use Considerations.** Species with very low or low levels of water requirements based on the Water Use Classification of Landscape Species (WUCOLS) tool, are more tolerant of long, dry periods and lack of water, and are preferred.
- **Durability and wind resistance.** Species that are not prone to sudden limb drop and provide for good wind buffers are preferred.
- **Canopy and subsurface growth habits.** Species that do not have growth characteristics such as surface roots, extensive sucker production, or abundant fruit litter are preferred.
- **Irrigation drainage and soil qualities.** Trees that do well under a variety of different irrigation and soil conditions are preferred.
- **General aesthetics and shading potential.** Trees that provide canopy cover over hardscape with some aesthetic benefits, such as showy flowers or attractive fall color, are preferred.
- **Native tree species.** Native trees are those that naturally occur in a region and support biodiversity and wildlife. Species that are native to the Southern California region are preferred with consideration of species diversity standards.
- **Availability.** Trees that are generally available in local nurseries are preferred.
- **Substitution of Cultivars.** Staff may substitute different cultivars of the Crape Myrtle, Redbud, or Chitalpa if the designated cultivar is not available.
- **Roadway Clearance.** The Highway Design Manual specifies certain vertical clearance requirements determined by the roadway classification. These measurements are taken from the lower foliage of overhanging branches.

Designated street trees, unless otherwise noted, are standard form single trunk trees to accommodate their eventual mature size. This form is best to maintain safe vehicle and pedestrian access around the tree. Multi-trunk trees are not an approved form for a street tree unless approved by staff for a valid reason.

The Designated Street Tree List shall be retained by the Community Services Department. The list shall identify every public street in the City with approximately three to five designated species being denoted in both botanical and common names.

Redesignation Process

Sections 12.26.020 and 12.26.030 of the Claremont Municipal Code (Appendix A) declares that all revisions or updates to the Designated Street Tree List shall first be recommended by an ISA Certified Arborist, reviewed by the Director of Community Services, or his or her designee, and forwarded to the Community and Human Services Commission for approval.

Property Owner Appeals. If a property owner does not agree with the Commission's decision to either revise or update the Designated Street Tree List for the street in which



the property exists, the property owner may appeal the decision to the City Council. The Community Services Department shall provide interested property owners with information on the commission appeal process.

Inventory Administration

The Community Services Department shall keep current an inventory of all City-owned trees, including detailed site characteristics and work histories for each tree. The inventory shall be updated on a continual basis by the City's contractor and/or staff.

The inventory of City trees identifies a geospatial location (latitude and longitude coordinates), species (both scientific and common names), diameter at standard height (DSH), height, condition, parkway size, overhead utilities, estimated asset value, recommended maintenance, and work history.



MAINTENANCE GUIDELINES

General

Certified Arborist. Any City-contracted tree company shall be required to have in their employment a full-time permanent Certified Arborist, as accredited by the International Society of Arboriculture (ISA). This person shall be responsible for ensuring that the contractor's crews are performing work according to ISA Best Management Practices (BMPs) and American National Standards Institute (ANSI) Standards. The City strongly recommends that Claremont residents only use a firm that employs an ISA Certified Arborist for any work performed on privately owned trees.

Certified Tree Worker. All crew leaders performing tree work on City trees should be trained according to ISA BMPs and ANSI Standards and hold the ISA Certified Tree Worker.

Contractor Qualifications. All contractors shall provide all services in compliance with City specifications. Specifications are written based on the policies outlined in this Manual. It is recommended that property owners utilizing contracted tree workers require proof of proper licensing/insurance and obtain several references before employing them.

Every contractor hired by the City to do tree work shall:

- Agree to perform all tree work according to the City's ISA Certified Arborist specifications, guided by ISA BMPs and ANSI Standards, and follow the guidelines established in this Manual.
- Provide the City's ISA Certified Arborist with the name and on-site phone number of each of its designated Crew Leaders for each day of work.
- Ensure that its Crew Leaders remain on site to supervise all work while work is being performed.
- Ensure that each Crew Leader has a complete and current copy of the Manual while the contractor is performing work on City Trees.
- Ensure that all Crew Leaders are fully familiar with the contents and requirements of the Manual, to the extent that it impacts their work.
- Recycle green waste as directed in their contract.
- Have a valid State Contractor's license for tree work.
- Provide Worker's Compensation to their employees.
- Provide equal opportunity employment.
- Have appropriate liability insurance.
- Provide California Manual on Uniform Traffic Control Devices (CA MUTCD) approved traffic control while performing maintenance operations/work. Traffic control layout shall be approved by the City Engineer prior to the start of any work and inspected at the City Engineer's discretion.



Site Cleanup. Work areas shall be left in a condition equal to or better than that which existed prior to the commencement of forestry operations. All debris shall be cleaned up each day before the work crew leaves the site unless permission is given by the City to do otherwise. All lawn areas shall be raked, all street and sidewalks shall be swept, and all brush, branches, rocks, or other debris shall be removed from the site. The Contractor will be required to correct any damage caused to the roadway, sidewalk, and/or right-of-way during tree maintenance operations.

Planting

Sections 12.26.050 and 12.26.060 of the Claremont Municipal Code (Appendix A) establish the conditions for all tree plantings that take place on City property or within City right-of-ways. The Community Services Department shall be responsible for the planting of all City trees. The following guidelines promote sustainable urban forestry principles and arboriculture BMPs which prioritize the health, safety, and longevity, of City trees from the time that they are planted through their maturity. These specifications shall be required for any City tree that is to be planted.

Season to Plant. Unless otherwise approved by the Community Services Department, most planting of trees in public rights-of-way (ROW) shall take place between mid-fall and early spring to take advantage of the dormant period for most trees and the cooler, wetter seasons of the year. If a property owner, requests a tree outside of the planting season, the City can accommodate the request with a commitment from the property owner to water the tree to arboriculture BMPs and to pay for the cost of the tree and planting through the City's Residential Pay Program.

Viable Planting Sites. It shall be the objective of the City to plant all viable vacant sites located on City property or within City right-of-ways, to honor all resident requests for new street trees in viable locations, and to replace any City tree which has been removed with the provision that the remaining vacant site is viable for planting. Viability shall be based upon the following criteria:

- **Spacing.** There is adequate spacing present overhead, underground, and radially to allow for the healthy, unimpeded growth of the tree to its mature stature. Specific examples of spacing conditions that may make a site unsuitable for planting include inappropriate canopy room between existing trees, too close a proximity of a planting site to existing water, gas or sewer lines, potential for conflict with overhead power lines, or inadequate width of the location's parkway for accommodating the tree's girth.
- **Traffic Clearance.** There is adequate line of sight visibility between normal vehicular or pedestrian traffic and necessary signage, street lights, or views.
- **Maintenance Resources.** There is an adequate and consistent water source available.
- **Funding.** There is funding available in the current fiscal year's budget for tree planting.



Planting Large Stature Trees. When selecting the tree species to plant in a viable vacant site, the largest stature tree from the Designated Street Tree List shall be selected. Large stature trees, in comparison to small stature trees, provide increased environmental, economic, and shade benefits. When the largest stature tree is selected for each viable planting site, canopy cover can expand with a lower quantity of trees planted.

Replacement Trees. Each year staff and the City's ISA Certified Arborist will determine a list of appropriate planting sites. This list will include resident requests for new trees and replacement plantings for removed trees. Staff will follow the guidelines outlined above to determine if each site is viable, and which tree species are appropriate for the location, with a goal to maximize the environmental benefits and economic values provided by selecting large stature trees while meeting the designated criteria.

Resident Notification. The City's ISA Certified Arborist will evaluate all potential planting sites to determine if they are viable. Properties that have a viable planting site will receive a letter confirming that the City will plant a tree at the property in the right-of-way. The notification letter will provide a timeline for planting, outline the environmental and economic benefits of City trees and provide education on proper watering methods to establish a newly planted tree. Residents will be invited to select the species of tree that will be adjacent to their property from the options available on the Designated Street Tree List. Prior to planting, the curb will be marked identifying the location for planting.

Properties that are non-responsive are less likely to water and care for a City tree, leading to high mortality rates and will therefore not receive new trees. Viable sites on non-responsive properties will be moved to the bottom of the City's planting list deferring outreach and planting to a future date.

Nursery Stock Standards. The City shall make every effort to ensure that it plants only vigorous, healthy trees which can easily be trained into an attractive natural form, with strong roots and good crown development. The specifications for acceptable nursery stock follow the ANSI Z60.1 standards and shall be as follows:

- All nursery stock shall be inspected by an ISA certified arborist employed by the City of Claremont prior to the contractor provided warranty period expiring.
- All specimens shall be true to type or botanical name as ordered or shown on planting plans.
- All specimens should be of a size equivalent to that of a 15-gallon containerized tree with a trunk caliper of three quarters of an inch (.75") to one- and one-half inches (1.5"), measured at six (6") inches above the root flare.
- All specimens shall have a single, dominant leader (trunk) with a gradual taper and balanced branch distribution vertically, laterally and radially. Multi- trunk trees will not be accepted, unless specifically ordered by City staff.
- All trees shall be healthy and vigorous, have a form typical for the species or cultivar, be well rooted, and shall be properly trained for structural stability.
- The root ball of all trees shall be moist throughout and the crown and shall show no



sign of moisture stress.

- All trees shall comply with Federal and State laws and regulations requiring inspection for plant disease, pests, and weeds.
- No tree shall be accepted that has been severely topped, headed back, pollarded or lion-tailed.
- No tree shall be accepted that has co-dominant stems or excessive weak branch attachments that cannot be pruned without jeopardizing the natural form of the species.
- No tree shall be accepted that is root bound, shows evidence of girdling or kinking roots, or has “knees” (roots) protruding above the soil.

The City shall reserve the right to refuse any nursery stock that does not meet these standards and may require any person who has planted such sub-standard trees, on City property or within City right-of-ways, to have these trees removed and replaced at that person’s own expense.

Planting Material Standards. Unless otherwise approved by the Community Services Department, all City trees shall be planted using materials that meet the following criteria:

- Tree Stakes – Shall be two (2) sturdy, ten (10’) foot long lodge pole pine stakes. Stakes shall be placed on the outer edge of the root ball on either side of the tree, parallel to the curb or walkway, or perpendicular to prevailing winds.
- Staking Ties – Shall be thirty-two (32”) inch non-abrasive flexible tree ties in a figure 8, to be fastened to each stake with galvanized roofing nails. Ties will be pulled around the tree’s trunk in a manner which supports the top-heaviness of the crown but is loose enough to allow for three (3”) to four (4”) inches of movement of the tree in the wind to build trunk caliper.
- Wood Chip Mulch – A three (3”) to four six (4”) inch layer of City-approved wood chip mulch shall be placed within the planting basin of the tree. A space of three to four (3 - 4”) to six (6”) inches three (3”) inches shall be left between the tree’s trunk stem and the mulch layer, radially, to allow airflow and to restrict moisture from remaining static around the base of the trunk.
- Within urban environments root barriers may be installed to the manufacturer’s specifications and under the supervision of an ISA Certified Arborist. Root barriers shall not encapsulate the tree’s roots and allow a pathway without the barrier where roots can grow.

Tree Planting Specifications. Most nursery tree stock in California is sold in a containerized form. The following guidelines are specific for containerized stock. If utilizing bare root or balled and burlapped trees, refer to the appropriate ISA BMPs for tree planting.

All trees shall be planted immediately after the planting container has been removed.



Containers shall not be cut or otherwise damaged prior to delivery of trees to the planting area.

The planting hole is one of the most important factors in establishing a healthy tree. Measure the width and depth of the root ball prior to digging. The diameter of the planting hole shall be dug at least two (2) times wider than that of the root ball. The depth of the planting hole shall be dug slightly shallower than the depth of the root ball to allow for the top two (2") inches of the root flare to remain above the finished grade.

Before placing the tree into the planting hole, tamp down the base of the hole to allow the tree to stand straight and to avoid the potential of the tree settling below the finished grade. Scarify or scrape the sides of the planting hole to break down any glazing or compaction which may have occurred from digging.

Position the tree in the hole so that the tree stands upright and the top of the root crown is slightly exposed above the grade. Then, backfill the planting hole with clean, native soil no higher than halfway up the root ball. Slightly tamp the soil to remove air pockets but be sure not to compact the soil too much. Complete the backfilling to the finish grade. Once again, tamp the soil slightly to remove air pockets.

Form a watering basin out of backfill material, approximately four (4") inches high, around the drip line of the tree. Remove all nursery stakes, ties, and ribbons from the tree, and install the planting materials as specified above. Give the tree an initial deep watering to permeate the entire root ball. Provide water to tree as water permeates soil to avoid runoff and inefficient watering.

Tree stakes and ties should be removed from the tree upon establishment into the landscape. Typically, this is between three and five years after planting. Check if a tree has established into the landscape by gently moving the trunk and observing movement of the root ball. If the root ball moves independently of the soil, the tree is not yet established and will benefit from additional time being staked. If the root ball does not move when the trunk is moved, the tree has established into landscape and stakes shall be removed. The tree's ability to develop trunk taper will be hindered and there is risk of girdling and wounding the trunk if stakes are not removed shortly after establishment.

For specific details on proper planting procedures refer to the City website at www.ci.claremont.ca.us/trees.

Conflict Prevention at Planting

The first step in the process of planting new trees is to select the "right tree in the right place," where a tree can grow into maturity without coming into conflict with surrounding infrastructure. If necessary, a redesignation of species can be made to accommodate areas of low soil volume and limited growing space.

A list of options to minimize infrastructure conflicts are included in Appendix D. Feasible options shall be considered at the time of planting to minimize future infrastructure



conflicts. Not all options are feasible for every site due to cost, neighborhood characteristics, and logistics. However, all methods provide additional root growth area, reducing likelihood of root damage to sidewalks, and flexibility for tree species selection and shall be considered at the time of planting.

Maintaining the Tree's Growing Space

A tree in a natural forest will deposit mulch in the form of fallen leaves or pine needles, several inches deep at its base. Naturally occurring mulch provides nutrients while allowing air and water to permeate the soil.

In urban environments, however, residents and property owners may have reasonable concerns about preventing the growth of weeds around the base of trees and avoiding the accumulation of leaves and pine needles that may clutter walkways.

Acceptable Methods of Mulching and Weed Suppression. Mulching the planting area with four (4") to six (6") inches of wood chips or chunk bark is recommended. A space of three (3") inches radius shall be left between the tree's trunk and the mulch to allow airflow and to restrict moisture from remaining static water around the base of the trunk. Weed barriers, if used, should be made of permeable fabric.

Unacceptable Methods of Weed Suppression. Property owners shall avoid applying any landscaping material to the base of trees that will compress the soil below it or make it impermeable to air and water:

- Bricks
- Cement
- Heavy rocks or boulders
- Plastic weed barriers

Property owners shall utilize the mulch ring as a weed suppressant and visual method to easily avoid using mechanical equipment near the base of the trunk. Mechanical equipment includes lawnmowers and/or weed whackers, which can inflict significant mechanical injury to tree trunks, damaging the vascular system. When the vascular system is damaged, the trees' ability to carry water and nutrients throughout the tree is inhibited, causing the health of the tree to decline, potentially leading to tree mortality.

Watering Schedule

Section 12.26.040 of the Claremont Municipal Code (Appendix A) defines the responsibilities of property owners with a public easement over their property. These responsibilities include providing adequate water to any City tree planted in the easement.

Newly installed trees, including low water use species, are dependent upon supplemental irrigation until established, typically for three years after planting. Selecting tree species to plant that are designated by the WUCOLS as low or very low water users assist in



water conservation efforts while allowing the urban forest to be maintained. Periods of extreme heat, wind or drought may require more or less water than recommended in these specifications. The amount and frequency of watering may be decreased during winter, since natural rainfall cycles may provide adequate water.

Deep Watering. Watering to the root depth, sometimes referred to as “deep-watering”, is an arboriculture BMP to establish a vigorous root system to efficiently transport water throughout its life. Water and nutrient absorbing roots are typically within the first six (6”) to twelve (12”) inches of soil. Water should be applied at a slow rate and permeate into the soil before applying additional water.

The goal of deep watering is to deliver water to the lower extremity of the tree’s roots, promoting a deeper rooting of the tree and thereby reducing the tendency of roots to search for moisture at the surface. In urban environments, this produces the additional benefit of directing tree roots downward within the first twelve (12”) inches of soil, where they are less likely to interfere with hardscape at street level.

Although deep watering is always preferable, it may not be sufficient to compensate for the typical root growth patterns of some tree species. The typical root growth pattern of a species should always be taken into consideration when planting new City trees.

Watering Newly Planted Trees. Watering requirements for newly planted trees will vary based on species, location, time of planting, and soil conditions. Although an ISA Certified Arborist should advise on watering recommendations for specific trees whenever possible, the following recommendations generally apply:

During the first three years after a tree is planted, it shall be watered thoroughly to their root depth to arboriculture BMPs. In instances of very hot weather, a tree may need as much as 10 gallons per caliper inch per week. For example, if a tree is in a 15-gallon container prior to planting, the trunk caliper is approximately 1.5 inches, necessitating up to 15 gallons of water per week. This amount can be drastically reduced (to 5 gallons or less per week during cool weather). Water slowly to avoid runoff and encourage deep watering.

Water may be provided in a variety of ways:

- Applying a garden hose on a slow drip.
- Creating a “tree-well” around the base of the tree and filling it with water that can slowly be absorbed.
- Using a drip irrigation system that is set to deliver at least 10 gallons of water per trunk caliper inch per week.
- Filling a plastic bladder or “tree bag” with water and allowing it to slowly release water into the ground,

The City encourages the use of water bags when new trees are planted to encourage

proper deep watering practices for City trees. Water bags may be filled by property owners once per week and provide slow release, deep water saturation to newly planted trees. The water bags also provide a visual reminder to property owners to water newly planted street trees. Tree watering bags are recommended during the first two to three years of establishment. Depending on available funding, the City may provide water bags at the time of planting. Watering bags are also available for private purchase through local retailers, including home improvement and garden suppliers. Care shall be exercised when using water bags to ensure water is permeating into the ground and not maintaining moisture on the trunk.

Newly Planted Trees in Drought-Tolerant Landscapes. Newly planted trees in drought-tolerant landscapes still need water. Even if a species of tree is classified as “California native” or “drought-tolerant”, it still requires regular watering. Once the tree is established, less water will be required.

Watering Established Trees. Effective methods of delivering water to the roots of an established tree vary depending on several factors. However, a few basic principles apply:

- Overwatering and underwatering of trees present similar symptoms. Overwatering shall be avoided for established trees by checking the soil moisture prior to watering.
- Water slowly for longer durations. Doing so will allow more time for water to penetrate to the tree’s root system. If water begins to run off, stop watering or cut back the rate of water flow so that it permeates into the ground. Allow sufficient intervals for the soil to dry out between watering.
- Water deeply rather than frequently. Depending on the age and species of the tree, soil type, shade, sun, slope, drainage, and current temperature, appropriate watering times may vary from as frequently as every ten days to as little as once per month. To avoid over watering, even in times of high heat or drought, check soil moisture prior to applying additional water.
- Water at the tree’s “drip line.” When it is raining, most mature trees naturally shed rainwater at the perimeter of the tree’s canopy – much like an umbrella. This is the area capable of absorbing the most water and where watering efforts should be concentrated, if possible. Watering closer to the trunk is not effective and may increase the risk of disease and trunk rot.

Tree Watering Alerts. The Community Services Department shall prepare community education regarding tree watering needs, including watering alerts during extreme weather conditions. Alerts shall be issued through the City website and through the City’s other established public communication channels. Alerts shall specify tree watering recommendations of where to water, how much to water, and how to check if a tree needs water prior to application.

Pruning

The Community Services Department shall be responsible for any and all pruning of City



trees. Section 12.26.090 of the Claremont Municipal Code (Appendix A) defines the custody and protections established for public trees. Tree pruning shall also meet or exceed Los Angeles County Fire standards for clearance. Further information on the Los Angeles County Fire standards can be found on the City website at www.ci.claremont.ca.us/trees.

All City trees shall be evaluated for pruning needs on a regular basis and pruned to International Society of Arboriculture (ISA), Tree Care Industry Association (TCIA), and American National Standards Institute (ANSI) Section A300 standards and BMPs. Before pruning any tree, a clear reason for pruning and objective shall be evaluated. All City trees shall be pruned in a manner that will preserve their health, develop proper branching structure, and natural appearance. For specific details on proper pruning refer to the City website at www.ci.claremont.ca.us/trees.

Pruning Techniques. Branch removal cuts and reduction cuts shall be the standard pruning technique for City trees. These cuts are achieved by removing a branch at its branch collar, or the shortening of a branch to a lateral that is large enough to assume the terminal role.

When removing a live branch, pruning cuts should be made just outside the branch bark ridge and collar. Improper pruning practices includes "flush cuts" which is made inside the branch bark ridge and collar. Flush cuts result in a larger wound which increase the time for the compartmentalization of decay in trees (CODIT), and extends the time the tree is vulnerable to pest or disease infection. If no collar is visible, the angle of the cut should approximate the angle formed by the branch bark ridge and trunk.

When removing a dead branch, the final cut should be made just outside the branch bark ridge and collar of live callus or wound wood tissue. If the collar has grown out along the branch stub, only the dead stub should be removed; the live collar should remain intact.

If it is necessary to reduce the length of a branch, the final cut should be made just beyond (without violating) the branch bark ridge of the branch being cut to. The remaining branch should be no less than one third (1/3) the diameter of the branch being removed, and with enough foliage to assume the terminal role.

Pruning cuts should be clean and smooth, leaving the bark at the edge of the cut firmly attached to the wood. The three-cut method, should be used to remove larger limbs to avoid stripping, tearing, or peeling of the bark, and to minimize unnecessary wounding.

Prohibited Pruning Techniques. Use of the following pruning techniques on City trees is prohibited under any circumstances:

- Topping
- Heading Back
- Stubbing
- Lion-Tailing



- Pollarding
- Rounding-Over

Young Tree Structural Pruning. All newly planted trees shall receive young tree maintenance approximately one-year after planting, and annually for trees where structural defects can be corrected over time as determined by an ISA Certified Arborist until they fall into the City’s grid trimming cycle. Properly trained trees have a higher potential to develop into structurally sound trees with strong branch attachments, reducing the risk of large tree part failures as they mature, and reducing the need for corrective pruning when they mature. All City trees should be trained to develop in a style consistent with each species’ natural growth pattern, rather than imposing a “standard style” on each tree. Young trees that reach a large mature size should have a sturdy, tapered trunk with well-spaced branches that are smaller in diameter than the trunk. When providing young trees establishment care:

- Evaluate the overall condition of the tree,
- Prune to remove any dead wood,
- Selectively prune the tree to develop good branching structure,
- Ensure stakes and ties are providing adequate support for the tree,
- Remove stakes and ties once the tree is established,
- Examine the watering basin to verify that the tree is receiving adequate water,
- Rebuild the water basin if needed and reapply mulch to preserve moisture and rebuild soil as mulch decays.

Pruning Mature Trees. When a young tree structural pruning program is implemented, a mature tree’s need for structural pruning should decrease. When pruning mature trees, no more than necessary to complete the objective shall be removed. In slower growing or particularly sensitive species (such as native Oaks), no more than ten percent (10%) of live growth should be removed.

Trees shall always be pruned to their natural form and should retain well- spaced inner lateral branches with foliage. Trees and branches pruned to ISA best management practices will disperse mechanical stress more evenly along branches and throughout the tree.

When trees mature, pruning should focus on maintaining tree structure, form, health and natural appearance, accomplished through one of the methods described below. Specific details on proper pruning are included on the City website at www.ci.claremont.ca.us/trees and include the following processes:

- **Crown cleaning**, is the removal of dead, dying, broken, diseased, crossing, weakly attached, and low-vigor branches from a tree’s crown; as well as the elimination of water sprouts, sucker growth and foreign materials from the entire tree. Crown



cleaning shall be completed on an as-needed basis.

- **Crown restoration** is intended to improve structure and appearance of trees that have sprouted vigorously after being broken, topped, severely pruned using heading cuts, or through storm damage. One to three sprouts, on main branch stubs, should be selected to form a natural appearing crown. The more vigorous sprouts may need to be thinned or cut to a lateral to control length growth or ensure adequate attachment for the size of the sprout. Crown restoration may require several prunings over several years. Crown restoration shall be completed as necessary, based upon the specific condition and circumstances surrounding the tree.
- **Crown raising** refers to the pruning of branches to provide vertical clearance below the crown to accommodate for traffic signs and signals, and pedestrian and vehicular traffic. Guidelines for crown raising to provide clearance is detailed below.
- **Thinning** is the selective pruning to reduce density of branches and foliage. Thinning shall only be performed when the defined objective is to increase air or light penetration. Contrary to popular belief, crown thinning generally decreases a tree's resilience to high winds.

Street, Sidewalk and Visibility Clearance. Street, sidewalk, traffic signal, and street sign clearance standards shall be achieved through crown raising. Crown raising is the removal of lower branches to provide clearance for vehicles, pedestrians, and bicyclists. Crown raising practices are in line with specifications from the 7th Edition of the Highway Design Manual (HDM) from the California Department of Transportation (Caltrans). Only those branches that must be removed to achieve the established height clearance standard shall be pruned. All such pruning cuts shall be made back to the nearest lateral found above the set minimum height standard. Where possible, young or developing trees should be maintained in such a manner that at least one half (1/2) of the foliage should be on branches that originate in the lower two thirds (2/3) of the tree. Similarly, branches should have even distribution of foliage along their lengths. This will ensure a well formed, tapered structure and will uniformly distribute stress within the tree.

All City trees shall be maintained to the height clearance specifications established below:

- **Over sidewalks, walkways, or park paths**, limbs shall be raised to a minimum of eight (8') feet from lower foliage of overhanging branches for pedestrian passage. In locations where no sidewalks exist, limbs may be retained below this minimum elevation so long as they conform to the natural shape of the species. In locations where City street trees are set back from, or do not interfere with, sidewalk traffic, limbs may also be retained below this minimum height specification.
- **Over bike paths**, minimum of eight (8') feet over bike path and seven (7') feet over shoulder. Where practical, a vertical clearance of ten (10') feet is desirable.
- **Over traveled way and shoulder**, limbs shall be raised to seventeen (17') feet from the pavement to the lower foliage of overhanging branches. Select streets may require a higher maximum over traffic lanes for existing mature canopy-forming limbs.



Trees must be located to not visually restrict existing roadside signs and signals. Only those branches that need to be removed to attain the visibility clearance desired shall be pruned. All such pruning cuts shall be thinned back to the nearest lateral found away from the structure, streetlights, or signage that is to be cleared.

Utility Clearance Pruning. In general line clearance is performed by utility companies. Line clearance tree workers must be trained to work safely around high voltage conductors. The United States Occupational Safety and Health Act (OSHA) and the American National Standards Institute (ANSI) have established minimum distances to be maintained by tree workers from electrical conductors. All line clearance work involving City trees shall adhere to these standards, as well as the utility pruning standards established by the International Society of Arboriculture (ISA) and the Utility Arborists Association (UAA). General Order 95, Rule 35 of the California Public Utilities Commission (CPUC) mandates that trees must maintain an eighteen (18") inch radial clearance from high voltage transmission lines.

The following guidelines are designed to maintain the required clearance of City trees from high voltage transmission lines with a minimum of resprouting and fewer pruning cycles. These guidelines are based upon known tree responses to various pruning techniques. In no sense should they take precedence over safe work practices.

- As few cuts as reasonable to achieve the required clearances.
- Limbs should not be arbitrarily pruned based on a pre-established clearing limit.
- A tree's growth under utility lines is most economically managed by lateral or directional pruning (thinning cuts). Directional pruning (V-notching) is the removal of a branch to the trunk or a significant lateral branch growing away from the conductor. Heading cuts (topping), on the other hand, encourage vigorous sprouting and increase the frequency of pruning cycles and the cost of maintenance. Heading cuts are prohibited on City-owned trees.
- All trees should be examined for hazards before commencing with line clearance work.
- Hangers and dead wood should be removed.
- Where possible, the tree should be allowed to attain normal height, with crown development maturing away from high voltage conductors.
- Pruning should be restricted to removal of branches at crotches within the tree's crown.
- When the pruning of a branch will result in the loss of more than one half (1/2) of the foliage on the branch, it should be removed to the parent stem.
- The three-cut method shall be used when removing large limbs to avoid stripping or tearing the bark, and to minimize unnecessary wounding.
- Heavy limbs should be lowered on ropes (rigged) to avoid damaging bark on limbs and trunks below.
- The placement of pruning cuts shall be determined by anatomy, structure and



branching habit.

- Final drop-crotch cuts should be made outside the branch bark ridge on the main stem or lateral branch. The remaining branch shall be no smaller than one third (1/3) the diameter of the portion being removed. The removed portion should be pruned to direct the remaining growth away from conductors.
- The use of multiple, small-diameter shaping cuts to create an artificially uniform crown form, commonly known as a "round over", or a hedged side-wall effect, is not cost effective nor consistent with proper pruning practice. Both round overs and the topping of trees for line clearance shall be prohibited in the City of Claremont.

Pruning Cycles. Frequency of pruning is also important to a tree maintenance program. The frequency for tree pruning should be based upon that species' growth rate, growth pattern, propensity to breakage, and susceptibility to environmental factors. Each City tree shall be inspected and pruned as necessary, or as program funds allow. Funded pruning cycles shall not preclude any necessary maintenance that may be required on individual trees.

Tree Care for Birds and Other Wildlife. Tree maintenance occurs throughout the year to ensure a safe urban forest for the community. The Claremont community is among the first to provide guidelines for their tree maintenance program concerning tree care for birds and other wildlife with a goal to minimize impacts of tree care to wildlife.

All persons performing tree care activities shall be familiar with the Western Chapter ISA BMP for Tree Care for Birds and Other Wildlife and should receive training to identify a nest in a tree. Prior to starting work on a tree, a pre-work inspection of trees for nests shall be performed. Ensuring a wildlife biologist or wildlife trained arborist is present at the project site during nesting season (February to August) provides further expertise in minimizing impacts of tree care to wildlife. The Community Services Department will include avian disturbance information provided by the tree maintenance contractor in the bi-annual report to the Community and Human Services Commission.

Resident Notification. Residents shall be notified of any large-scale pruning project affecting a City tree located in front of their home. If tree maintenance is skipped due to avian activity, the tree maintenance contractor posts a notice on the tree to inform the community. The Community Services Department will present pre-inspection results and avian disturbances to the Community and Human Services Commission on a semi-annual basis.

Root Pruning

The root system of a tree is one of its most important physiological components. Roots are the main source of water and mineral absorption, provide anchorage and stability, and act as one of the principal storage areas for food. The proper pruning of a tree's roots is as important as the proper pruning of a tree's crown.

Whenever possible, the City shall avoid removing any of a tree's root system. In instances



where there exists a need to install subsurface structures or utilities, such as irrigation lines or block wall footings, every effort shall be made to avoid encroachment within the drip line of a tree. If it becomes necessary to excavate within a tree's drip line, every effort shall be made to tunnel under or through the tree's root system with a minimal amount of pruning, rather than to trench across the tree's roots. A guide to proper root pruning is available on the City website at www.ci.claremont.ca.us.

If root pruning is deemed necessary, the first consideration is the tree's health and if the tree is vigorous enough to recover from root pruning. An ISA Certified Arborist shall perform a health assessment of each tree considered for root pruning. If a tree is determined healthy and vigorous enough to tolerate root pruning, the following assessment, performed by an ISA Certified Arborist, is necessary to determine if root pruning is feasible while maintaining safety of the tree.

1. Determine root type.
2. Do roots need to be cut more than 90 degrees of the tree's radius?
3. Are conflicting roots within a distance three times the DSH of the tree?
4. Are conflicting roots greater than three (3") inches in diameter?

When the root type is determined to be nonstructural and all remaining root pruning questions above are determined 'no', then root pruning may be performed. All root pruning assessments and root pruning, shall be performed by an ISA Certified Arborist

Hardscape. The City will consider and document all options to resolve tree and infrastructure conflicts prior to considering the tree as a candidate for removal. When root removal becomes necessary for the installation or repair of hardscape, such as sidewalks, driveway approaches or curb and gutters, two methods shall be employed by the City to address invasive or encroaching roots. Root pruning shall only be performed when the tree qualifies for root pruning through the assessment outlined above. If the tree does not satisfy the criteria described above, the tree is not a candidate for root pruning and shall be considered for removal. These two methods are specified below and are detailed on the City website at www.claremont.ca.us/trees.

- **Selective Root Pruning** is the removal of specific offending roots which are directly interfering with a work area. When pruning selective roots, retain as much root surface as possible, including sufficient buttress root dispersal around the radius of the tree. If more than 25% of a tree's root system must be removed, the tree shall be considered a candidate for removal. Roots shall be cut back at least four (4") inches away from new hardscape to the nearest node. Pruning cuts shall be made clean and smooth with no crushing or tearing of the remaining root.
- **Root Shaving** is the removal of a small portion of a nonessential buttress root or general roots with a diameter of four (4") inches or greater. Roots will be shaved down to allow for at least two (2") inches of clearance between the root and the bottom of the new hardscape. No more than one third (1/3) of a root's diameter shall be shaved off. Shaving cuts shall be made clean and smooth with no crushing or tearing



of the remaining root.

Soil shall be backfilled immediately following pruning or shaving activity to minimize drying of the roots. Any root pruning or shaving shall be approved by an ISA Certified Arborist.

Preventing the Spread of Disease Any pruning of diseased trees shall follow best management practices. When pruning a tree with an identified disease that is easily spread from pruning tools, tools should be sterilized after each pruning cut. If a tree is identified as having a disease that spreads through tree debris, the tree debris produced shall not be comingled with clean green waste and shall be heated to kill pathogens prior to disposal.

Pest and Disease Management

There are many regularly occurring pests and diseases found in urban landscapes. These can include, but are not limited to, aphids, scales, lerps, sharpshooters, white-fly, caterpillars, acorn weevils, powdery mildew, sooty mold, or anthracnose. These pests and diseases can create unsightly and/or nuisance symptoms in susceptible tree species. Symptoms can include honeydew/sap drop, skeletonized leaves, leaf curl/necrosis, or premature leaf drop.

Pests and diseases of this nature alone are not considered immediately detrimental to the long-term health of the tree or urban forest. Eradication of these regularly occurring pests or diseases is not feasible in a broad setting such as an urban forest. Because of this, chemical applications are not always practical or financially feasible. The City will consider treatment for pests and diseases that affect the health and safety of a tree, not for aesthetic or nuisance complaints. Consideration for treatment will be considered on a case-by- case basis.

The best way to reduce pest problems is to use Best Management Practices during the planting, pruning, and care of the trees to promote optimum health. Vigorous, healthy, well-watered trees have natural defense mechanisms that can withstand certain levels of pest and disease infestations.

Integrated Pest Management (IPM)

In situations when more aggressive or newly introduced invasive pests and diseases are identified in the urban forest, additional control measures may be warranted to limit the establishment of these news threats in the urban forest. When these pests or pathogens are discovered, Claremont follows generally accepted Integrated Pest Management (IPM) techniques.

IPM is a process used to solve pest problems while minimizing risks to people and the environment. Approaches for managing pests are often grouped in the following categories:



- **Cultural Controls:** Cultural controls are preventative practices that reduce pest establishment, reproduction, dispersal, and survival by providing a growing environment favorable for the host plant and unfavorable to pests.
- **Mechanical and Physical Controls:** Mechanical and physical controls eliminate a pest directly or make an unsuitable environment for the identified pest
- **Biological Control:** Biological control is the use of beneficial organisms like natural predators, parasites, or pathogens to control and manage pests and their damage.
- **Chemical Control:** Chemical control is the use of conventional, manufactured pesticides to control, prevent, or repel pests. The least hazardous and selective pesticide will always be utilized first for the identified pest. Further, a pesticide will only be applied in a discerning manner that targets the specific pest of concern while avoiding exposure to non- targets. Where applicable, selective treatments will be applied in combination with other IPM measures for more effective, long-term control.

Removal

The City's policy is to protect and preserve healthy trees whenever possible to preserve the valuable benefits to our environment, and increase the quality of life in Claremont. Section 12.26.090 of the Claremont Municipal Code (Appendix A) defines the custody and protections established for all City trees.

The Community Services Department shall be responsible for all removals of City trees. Upon tree inspection, the City shall first consider and document all feasible conflict resolution options prior to tree removal. Removal shall be avoided if a resolution method can reduce tree risk to an acceptable level. However, if removal is determined to be necessary, the tree will either be categorized as an "Emergency Removal," or a "Non-Emergency Removal." Emergency Removals and Non-Emergency Removals will differ in notification procedures to the community as described below in this section. To replace removed trees, the City encourages the planting of a same- or larger- stature tree (when feasible) for each tree removed within the next planting season, unless otherwise determined a non-viable site.

Claremont residents who will have a City tree planted in their right-of-way, receive a notice prior to the tree being planted. This notice includes a list of select species approved by the City Council for their location from the Designated Street Tree List (Appendix B). A variation of species is provided, and the resident makes the final determination on the species from the list of options. This process of choosing a species from a select list, encourages buy-in from the resident who will be providing water to the tree. Although the City of Claremont recognizes the value of selecting a species which maximizes the canopy cover and environmental benefits provided by each tree, gaining buy-in for establishment care watering from a resident increases the likelihood of a newly planted tree to grow through maturity. The City will encourage residents to select a species that will maximize each planting sites' capacity to provide environmental benefits by including educational material to each resident receiving a tree.

Reasons NOT Valid for Tree Removal:



- Nuisance debris.
- Messy fruit.
- Nuisances created from non-lethal pests and diseases.
- Roots getting into the sewer lines resulting from deteriorating infrastructure.
- Hardscape damage if a feasible, economic solution exists to save the tree.
- General dislike of certain species or variety of tree.
- Surface root intrusion.
- Converting to water-wise landscaping.

Unauthorized Trimming and Removal. According to section 12.26.090 of the Claremont Municipal Code, it is unlawful for any person to injure, cut, damage, carve, transplant, prune, root prune, or remove any public tree. Procedures for addressing violations are outlined in section 12.26.110 of the Claremont Municipal Code.

Special Circumstances

City Trees and Solar Panels. The City complies with existing solar access regulations in the State of California, including The Solar Rights Act (AB3250) and The Solar Shade Act (AB2321). The Solar Shade Act prohibits shading of solar collectors that result from tree growth occurring after a solar collector is installed. It states that no plant may be placed or allowed to grow such that it shades a collector more than 10% from 10 am to 2 pm. It does not apply to plants already in place or replacement of plants that die after the installation of the solar collectors.

Open Space. Portions of the urban forest that abut open space will meet or exceed the Los Angeles County fire clearance standards. The City also maintains open space that abuts properties in accordance with the Los Angeles County Department of Agriculture Commissioner/Weights and Measures annual weed abatement and brush clearance standards. This includes clearance of brush, dry weeds, or dry vegetation within 100 feet up to 200 feet from a home or structure.

Emergency Removals

A tree removal is categorized as an Emergency Removal if the tree is deemed a threat to public safety due to its health or structural conditions and its location. Emergency removals including, 'Hazardous' and 'Dead/Severely Declining' removals.

A tree may be categorized as a 'Hazardous Tree' after a risk assessment by a Tree Risk Assessment Qualified (TRAQ) ISA Certified Arborist utilizing the TRAQ program, and risk mitigation will not lower the risk to an acceptable level as determined by the City. A tree may be categorized as 'Dead/ Severely Declining,' and be eligible for removal, after a tree health inspection determines the tree as such.



The Community Services Department shall have the authority to remove a City tree without further inspection or prior notice to the public based upon the following conditions of each Emergency Removal:

Hazardous Trees.

The Community Services Department shall identify potentially hazardous trees based on, but not limited to, the severity of the following conditions:

- Large dead branches in the tree
- Cavities or rotten wood along the trunk or in major branches
- Mushrooms or conks present at the base of the tree
- Fractures or splits in the trunk
- Fractures or splits at the crotch or branch attachment
- Strong, uncorrected lean at the trunk with lifting soil
- Multiple branches with poor attachments arise from one point on the trunk
- Damaged, broken, or injured roots
- Tree has been topped or otherwise heavily pruned resulting in poor structure

Hazardous Trees Inspection.

Before a tree is categorized as a 'Hazardous Tree' within the Emergency Removal criteria, an ISA Certified Arborist with the Tree Risk Assessment Qualification (TRAQ) shall perform a Level 2 Tree Risk Assessment to determine the level of risk and possible risk mitigation options. In some instances, it may be appropriate to perform a Level 3 Tree Risk Assessment utilizing special equipment to further inform the process of determining the level of risk. Once a level of risk is determined, all feasible risk mitigation options will be considered and documented. If risk mitigation options are feasible, risk mitigation shall occur with the intent to reduce risk to an acceptable level as determined by the tree owner. Should feasible risk mitigation options maintain a level of unacceptable risk, the tree shall be considered a 'Hazardous Tree' and eligible for removal under the Emergency Removal criteria.

Dead/Severely Declining Trees.

Street and park trees that are dead or have been determined by an ISA Certified Arborist to be in a state of severe decline, shall be scheduled for removal. Severe decline includes, but is not limited to, trees containing pests or pathogens that cannot be managed or pose a threat to the urban forest, water-stress, decay, compromised root systems, or mechanical injury, where recovery from treatment is determined unlikely.

Due to their wildlife habitat value, dead and dying trees located in City-owned open space or natural areas shall not be removed unless they pose an immediate hazard or other reasons that warrant their removal.



Notification Procedure for Emergency Removals.

No public notification is needed when trees are categorized as an ‘Emergency Removal’ (See Exhibit 1). The list of Emergency Removals performed shall be submitted monthly to the Community and Human Services Commission. Documentation of all trees removed shall include the reasoning for categorization as an Emergency Removal and alternative management strategies that were considered.

Exhibit 1. Emergency Removals - Notification Procedure.

Proposed – Emergency Removals

Emergency Removals include the categories: Hazardous and Dead/Severely Declining

1

No public notification is required for Emergency Removals.

2

City submits list of performed removals monthly to the Community & Human Services Commission.

Source: Dudek 2024.

Non-Emergency Removals.

Removals that do not meet the criteria of Emergency Removals. A tree condition assessment with documentation shall be performed for each tree removal proposed. Tree removals categorized under the Non-Emergency Removal procedure, are outlined below:

Declining Trees. Declining trees can be caused by many factors including, but not limited to, drought or heat stress, construction impacts, pests, and pathogens. Although these factors and others may contribute to decline in a tree, a declining tree may recover. A tree will be preserved if a tree is declining but does not threaten the health of overall urban forest. If a tree is declining but not detrimental, tree removal will not be approved.

To determine if a tree is declining without potential for recovery, each tree shall be assessed in the systematic process outlined in this Manual and include documentation posted on the City’s website.

Not all pests or pathogens lead to tree mortality and failure. If a tree is suspected to be declining due to a pest or pathogen, the identified pest or pathogen is detrimental to tree health and longevity, and there is no known cure or remediation of the identified pest or pathogen, the tree will be as a qualified Non-Emergency Removal. The Integrated Pest



Management plan included in this Manual should be followed when evaluating a Declining tree as a Non-Emergency Removal when a pest or pathogen is identified.

Hardscape/Infrastructure/Building Damage. If hardscape/infrastructure/building repairs cannot be completed without severe root pruning, which would jeopardize the tree's stability, the tree may be removed only after all tree and infrastructure conflict resolution methods have been considered utilizing the charts in **Exhibit 2** and **Exhibit 3**. **Exhibit 2** and **Exhibit 3**, show a methodology to determine whether a conflict can be resolved to preserve the tree.

Excessive/Reoccurring Property Damage. Community Services shall have the authority to remove a tree causing hardscape/infrastructure/building damage if the cost of repairs is greater than the value of the tree or if the cumulative value of repairs outweighs the value of the tree. Trees causing re-occurring damage shall be reviewed for removal and replacement with new tree species appropriate for the location. Each tree species has an estimated cumulative value in the tree inventory software. The total estimated value will be divided by the quantity of the species in the inventory to determine an estimated value for each tree.

Americans with Disabilities Act (ADA) Compliance. The Americans with Disabilities Act (ADA) is a set of federal laws setting guidelines to ensure accessibility for all peoples. If a tree is causing an ADA compliance issue, all conflict resolution efforts shall be considered prior to removal. If ADA compliance cannot be met when considering all resolution options, the tree shall then be removed and repairs made to meet ADA compliance. The City will follow the 2010 ADA Standards for Accessible Design when considering conflict resolution options to remove a tree only when the result of the conflict resolution method is deemed insufficient. Following removal, Community Services will consider the opportunity for replanting using the "right tree, right place" philosophy.

If the planting site is still considered viable, all hardscape must be repaired and/or installed prior to replanting a new tree. Considerations for installing site appropriate conflict prevention measures at the time of planting, found in Appendix D, shall be analyzed for feasibility.

Resolution Methods for Tree and Infrastructure Conflict. Several tree and infrastructure conflict resolution methods are available for accommodating the installation of new hardscape or providing resolution to a tree and infrastructure conflict. These methods are included in Appendix E. Not all conflict resolution methods are feasible: location, cost, Americans with Disabilities (ADA) requirements, the latest Public Right of Way Accessibility Guidelines (PROWAG) guidelines, and traffic safety must be considered. The resolutions in Appendix E may be used when tree roots and hardscape conflict with intent to preserve the existing tree.

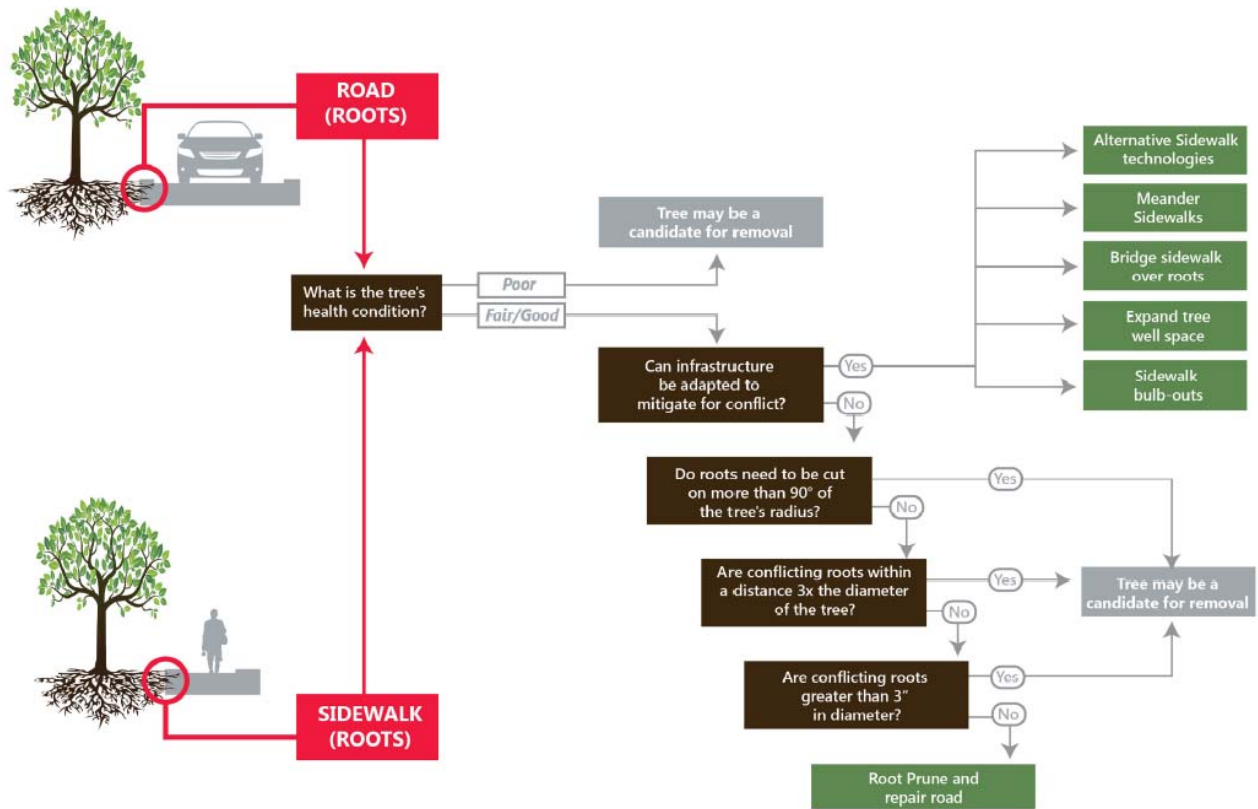
Hardscape Installation Guidelines on Public Property. The general policy that shall be observed when repairing or replacing hardscape adjacent to a City tree is that the health and integrity of the tree take precedent over the installation of concrete or asphalt. Every effort shall be made to protect the tree from root or trunk damage. Should a tree health assessment determine that hardscape repair will compromise the ability of the existing tree to recover, the



tree shall be considered for removal utilizing the charts in **Exhibit 2** and **Exhibit 3**.

Exhibit 2. Root Conflict with Roadways and Sidewalks- Conflict Resolution Feasibility Chart.

What to do for tree **ROOT** conflicts with **ROADWAYS** and **SIDEWALKS**

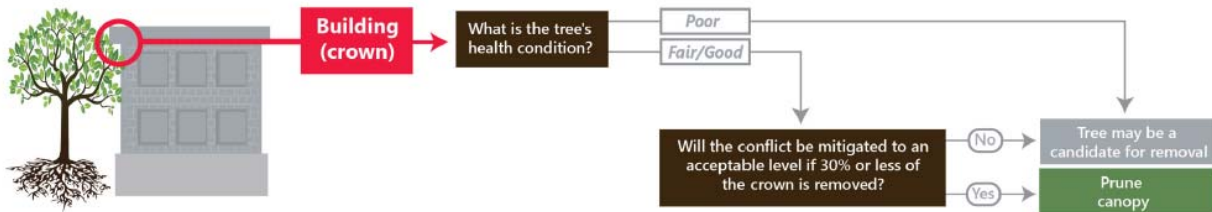


Source: Dudek 2024.

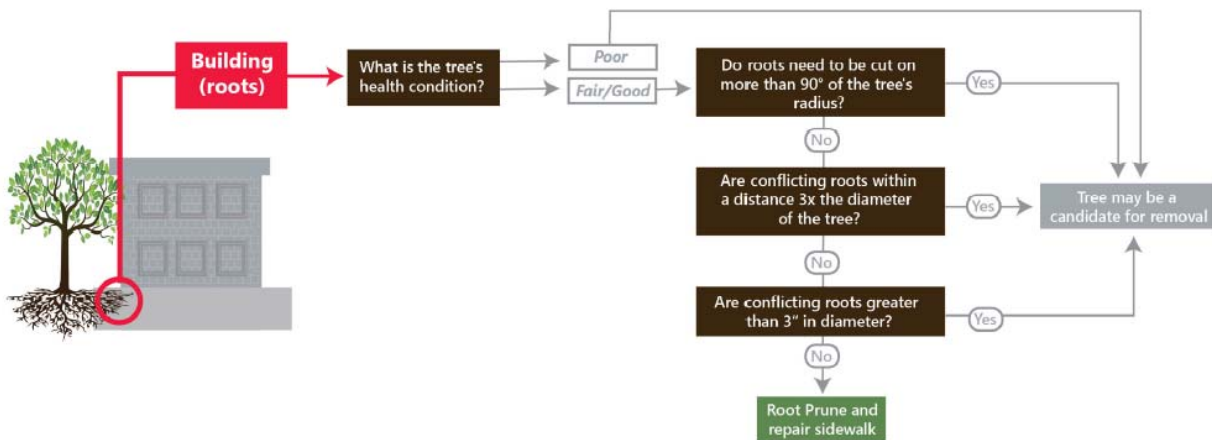


Exhibit 3. Crown Conflicts with Buildings – Conflict Resolution Feasibility Chart.

What to do for tree CROWN and BUILDING conflicts



What to do for tree ROOT and BUILDING conflicts



Source: Dudek 2024.

Volunteer Trees. Volunteer trees are seedlings that grow without being planted. Due to the nature of volunteer seedlings, volunteers sometimes grow in sites that cannot accommodate trees at mature stature. When volunteer trees arise within the City’s right-of-way, an ISA Certified Arborist shall inspect the volunteer tree’s location and determine if the tree at maturity will grow without causing potential below or above ground infrastructure conflicts. If upon inspection, the volunteer tree is determined likely to outgrow its site, the volunteer tree shall be removed. Additionally, if the volunteer tree does not meet the qualities listed below, and young tree structural pruning is unlikely to easily train a structurally sound tree, as determined by an ISA Certified Arborist, the volunteer tree shall be removed.

- All specimens shall have a single, dominant leader (trunk) and balanced branch distribution vertically, laterally and radially.
- Tree shall have a gradual taper if applicable at the time of inspection.



- All trees shall be healthy and vigorous, have a form typical for the species or cultivar, and shall be properly trained for structural stability.
- Tree contains co-dominant stems, multiple trunks, or excessive weak branch attachments that cannot be pruned without jeopardizing the natural form of the species.

Notification Procedure for Non-Emergency Removals.

When trees are categorized as a ‘Non-Emergency Removal’ the following notification procedures shall be followed (See **Exhibit 4**):

Exhibit 4. Non-Emergency Removals – Notification Procedure.

Non-Emergency Removals include the categories: declining, hardscape/infrastructure/building damage/ADA compliance, and volunteer trees.



*Third-party assessment shall be performed by a separate provider than the City’s tree maintenance provider at the time of assessment. Costs of additional assessment shall be funded through the City’s Urban Forestry program.

Source: Dudek 2024.

Step 1 of **Exhibit 4** shall entail a comprehensive list of recommended tree removals with the tree assessment form, a photo, and preservation strategies considered, and work history. The proposed list and documentation shall be posted on the City’s website. Upon posting, an automatic email will be generated to interested parties. Posting the list on the website and the automatically generated email will initiate the 15-day public response period.

All objections must be submitted on the City’s website within the 15-day response period (Step 2 of **Exhibit 4**).



In addition to Step 4 in **Exhibit 4**, findings from the third party must be reported to the Tree Committee for discussion and as a recommendation to the Community and Human Services Commission. The Community and Human Services Commission will make the final determination.

Proactive Removal and Replacement Program.

Situations may exist where a group of trees is in severe decline and necessitate removal. Removing numerous trees throughout the City or in concentrated locations within a short timeframe, results in a sudden loss of trees and associated benefits for community members. Although replacement trees are planted within the next planting season to accommodate this loss, trees grow over a long period of time, and the majority of benefits will be realized as replacement trees mature. This also means, tree benefits received from a mature tree are not regained immediately upon tree planting.

Planning for a Proactive Removal and Replacement Program offers an opportunity to incrementally address the removal and replacement of identified trees over a longer timeframe. Removals identified in advance allows for a phased removal approach, dampening the sudden loss of trees and associated benefits. Once a tree is removed, the replacement tree will be planted within the next growing season, replacing lost benefits over time. In this phased approach, replacement trees begin to replace the benefits of removed trees before all the scheduled trees are removed. This strategy is intended to balance the loss of benefits and replacement of those benefits incrementally over an extended time frame.

In cases where multiple trees in one area need to be removed, all trees planned to be removed must fit the parameters above. For large groups of trees, the removal and replacement should be phased in a multi-year approach. An immediate replacement plan should be implemented, with an emphasis on planting the “right tree in the right place”. Any plan proposed for phased removal of trees in a defined area must be specifically crafted to meet the needs of the area. Such a proposal must be presented to affected residents as a notice or community meeting. In addition, this policy allows staff to propose a Proactive Removal and Replacement Program and initiate the public process which includes review by the Tree Committee and Community and Human Services Commission, and approval by the City Council prior to implement such a program.



PRIVATE PROPERTY OWNERS AND RESIDENTS

Private Property Hardscape Installation Guidelines. The same general policy for hardscape installation on public property shall be applied to private property. Every effort shall be made to protect the tree from root or trunk damage. To minimize the potential for future hardscape damage, hardscape on private property shall not be installed within three (3') feet of the base of a City tree.

Private Property Hardscape Damage Response Procedure.

- Hardscape damage is on private property and thereby cannot be addressed by City crews. However, there are clear-cut indications that at least some of the damage has occurred as a direct result of a City tree. Thus, the property owner may have reason to file a claim for damages with the City Clerk.
- If the property owner does elect to file a claim, the Community Services Department and/or an ISA Certified Arborist shall be responsible for evaluating the damaged area and submitting a Tree Assessment Report to the City Clerk for inclusion with the claim file. In this case, property owners will be expected to pay for report submission fees.
- Hardscape damage is on private property and thereby cannot be addressed by City crews. When no clear-cut indications exist that a City tree is the source of the damages, the property owner shall be responsible for excavation of the damaged area for the purpose of exposing any invasive roots, should they wish to file a claim for damages with the City.
- Upon excavation of the area, it is the property owner's responsibility to contact the Community Services Department and schedule an evaluation and assessment of the damage. The Community Services Department shall be responsible for submitting this assessment report to the City Clerk for inclusion with the property owner's claim.
- Hardscape damage is on private property and is clearly not caused by a City-owned street tree; therefore, the City is not responsible for damages or repairs.

Once a course of action has been determined, staff shall be responsible for providing written notification to the City Clerk's office informing them of the findings and the measures needed to rectify the problem.

Private Contracting. For any work performed on privately owned trees, the City recommends that residents:

- Only hire tree companies that employ an ISA-Certified Arborist.
- Require proof of proper licensing and insurance.
- Obtain several references before employing any company.



- Consult the ISA website (www.treesaregood.org) and inform themselves of ISA-recommended procedures for pruning young or mature trees, as applicable.
- May require a traffic control permit from the Engineering Division.

Property Owner Request for Removals. Periodically, property owners approach the City with requests to remove a City tree that is located within the public right-of-way on their property. Community Services staff and a staff ISA Certified Arborist have the authority to approve these requests only if the tree is dead, declining, , hazardous, or an emergency condition exists, as referenced above; otherwise staff will deny the request. Property owners may appeal the staff denial by written request, which shall be brought before the Tree Committee and Community and Human Services Commission. Per Municipal Code Section 12.26.020 (B) “the Commission may grant an appeal if it finds that the staff decision would result in a burden on the property owner that substantially outweighs the benefit to the public. The Commission’s decision may be appealed to the City Council if a written appeal, setting forth the grounds, is filed with the City Clerk within ten days of the Commission decision. If no timely appeal is filed, the decision shall be final.”

Community Services staff shall provide all interested parties with information on the committee and commission review process. Any tree removal requests brought forth to the Tree Committee and Commission shall be evaluated by staff and an ISA Certified Arborist. The Community and Human Services Commission will evaluate tree removal requests individually, considering any of these factors listed below to determine if tree’s removal represents a greater loss to the public than the burden placed on the property owner by its continued existence:

- Species of the tree. Does the tree’s species further the City’s urban forest management goals?
- Size of the tree. Does the tree’s size provide significant value in terms of shade, tree canopy, and neighborhood character?
- Approximate age of the tree. Whether the tree is young, mature, or near the end of its life cycle may be considered.
- Health of the tree. Is the tree in good health or it is showing signs of advanced decline or approaching the end of its life?
- Physical characteristics of the tree. Does the tree have species appropriate structure and form that suggests structural integrity?
- Environmental productivity of the tree. Is the tree believed to be environmentally productive or has productivity likely declined due to age, condition, or poor health?
- Safety of the property owner and general public will be considered. The Commission may consider health and safety impacts for the residents, adjacent property owners, and public at large when evaluating a removal request.
- Asset value of the tree. The value of the tree as listed in the City’s inventory shall



be included in the information presented to the Commission.

- Utility conflicts, both above and below ground, public or private, may be considered when evaluating a removal request.
- Species and age diversification may be considered to determine if the street would benefit from having a more diverse street tree population to reduce threats of deforestation.

Consistent with previous sections of the Manual, trees may not be approved for removal based on leaves getting into gutters or a nuisance to remove, messy fruit or tree debris, roots getting into the sewer lines as a result of deteriorating infrastructure, hardscape damage if a feasible, economic solution exists to save the tree, or if an existing City tree is blocking solar panels.

If a property owner requests a tree removal and the request is approved by the Community and Human Services Commission, the property owner will be required to pay for the subsequent removal and the replanting of two 24"-box size replacement tree. This is not to say both trees will be planted on the subject property. Trees will be planted as the site permits. This practice is intended to contribute to the growth of the City's urban forest. Information regarding this requirement will be made available to the property owner prior to the commission process. Costs will be determined based upon the City's current contract rates for removal and planting. A viable planting site for the replacement tree will be determined by an ISA Certified Arborist. The accepted planting site may or may not be adjacent to the removed tree or on the same property. Property owners may appeal the requirement to pay for the requested removal and replanting of replacement tree(s) if they are able to demonstrate financial hardship.

Resident/Merchant Notification. To encourage public participation, City staff will post a notice on the affected right-of-way (ROW) tree no less than 72 hours prior to review by the Tree Committee and Community and Human Services Commission. The notice will include information on the proposed removal/property owner appeal and meeting dates, times, and locations. Agendas for Tree Committee and Community and Human Services Commission meetings will be posted a minimum of 72 hours prior to the meeting date for public review. Interested residents/merchants are invited to make public comment at the meetings or submit written comments for consideration.

The Community Services Department may or may not be able to notify the adjacent homeowner of emergency and hazardous tree removals due to the degree of urgency during these events. A list of newly planted and removed trees will be brought to the Community and Human Services Commission monthly as a receive and file item for information purposes.



CLAIMS

In keeping with the City's policies for protecting and preserving the health and well-being of our community forest while providing safety of our citizens, the following guidelines have been established for correcting potentially hazardous situations that result from tree roots disturbing nearby hardscape.

Hardscape Damage Response Procedures

There are several factors that must be considered in determining the course of action necessary for addressing hardscape damage concerns that involve City trees. These actions are driven by the extent of the damages, and whether the damages are located on private or public property.

The Community Services Department shall delegate the initial inspection of all hardscape damage to appropriate staff. If the hardscape concerns include potential damage to private property, the matter shall be referred to the Community Services Department's claim representative for evaluation. A Community Services Department Inspection Checklist is to be used by the claim representative for such tree assessments.

Upon initial inspection of the area, staff must determine what course of action is necessary to respond to the problem. The following are the most commonly occurring hardscape problems, and the courses of action that shall be employed to rectify them:

Public Property

Hardscape damage on sidewalks shall require a temporary asphalt ramp, followed by permanent repair of the area at a later date.

Hardscape damage is on public property other than sidewalks, but the nature of the damages cannot be rectified by temporary measures. Thus, areas in need of permanent repair shall be immediately placed on the repair schedule based upon the potential the damages have for creating a public safety hazard.

TREE DONATIONS

The Community Services Department shall make available to interested property owners, residents and others, the City's Gift Policy to encourage the donation of funds or trees to enhance the community forest. All donations of trees to the City must meet certain qualifications and restrictions set by the Community Services Department. Likewise, the department must follow certain procedures in the receiving of such gifts.

All tree donations shall be accepted only under the terms stated in Administrative Policy 10-12.

Trees may be donated to the City for planting in City parks or within City rights-of-way. The City shall make every effort to have the tree planted where the donor wishes but may not always be able to plant a certain tree in a certain place.

Standard Tree Donations

Standard tree donations may be in the form of monetary gifts funded specifically for the purchase and planting of a tree, or the donation may be a tree itself pending approval by the Community Services Department.

The general amount necessary for a monetary tree donation gift must cover the current average cost for a 15-gallon containerized tree with a trunk caliper of one- and one-half inches (1.5"), or greater, all necessary planting materials, as well as the labor costs involved in planting the tree. The current average cost for tree planting shall be determined by the ISA Certified Arborist and approved by the Director of Community Services.

All donated trees shall be approved by the ISA Certified Arborist only after the proposed tree and location have been reviewed in light of the Designated Street Tree List and the Nursery Stock Standards described in this manual.

Tree donations valued at less than \$500 shall be approved by the Director of Community Services. Tree donations valued at more than \$500 are subject to review by the Community and Human Services Commission, unless specifically waived by the City Manager. The City Manager shall make the final determination.

It is the responsibility of the Community Services Department to complete a proposed "Gift to the City" form for all tree donations, including acquiring necessary donor information and signatures. The completed original form shall be forwarded to the City's Finance Department. One copy of the completed form shall be returned to the donor, and one copy shall be retained by the Community Services Department.

Acceptance of donations implies no reciprocal agreement or obligation to the donor by the City other than designation of donated funds for specific tree gifts. Any tree



accepted by the City becomes the property of the City and shall be subject to all the policies described in this Manual.

It shall be the responsibility of the Director of Community Services to convey acceptance or non-acceptance of tree gifts to the donor within two weeks. If a donation requires lengthy review and approval, the donor shall be notified of such proceedings.

Recognition may be made to the donor through media coverage or other appropriate activities only with the consent of the donor.

Oak Park Cemetery Memorial Tree Program

The Oak Park Cemetery Memorial Tree Program is a donation program limited to the planting of trees on the grounds of the City's Oak Park Cemetery. Interested donors will be given a Memorial Tree Program application form informing them of the procedures, prices, species of trees, and locations available for their donation. Memorial tree donations shall be subject to the same conditions as standard tree donations, with the following amendments.

Memorial tree donations should generally be made through the Friends of Oak Park Cemetery. Location and species of donated trees will be selected by the donor from the list detailed on the reverse side of the application form. The tree list is subject to revision depending upon the availability of space in each cemetery quadrant. The donor's selections shall be reviewed by an ISA Certified Arborist, prior to approval.

The Friends of Oak Park Cemetery shall be responsible for providing to the donor a certificate acknowledging the gift.

The Oak Park Cemetery Memorial Tree Program is temporarily suspended pending future development.

Plaques

The City does not allow the permanent installation of plaques for donated trees. However, the City Council may approve permanent plaques in situations where it is determined that the plaque would be of benefit to the community.



PERMITS

Section 12.26.070 of the Claremont Municipal Code (Appendix A) sets the conditions for the acquisition of a permit for any work involving City trees. No person shall plant or otherwise disturb any City tree without first obtaining a permit from the Community Services Department.

Applications for permits must be made to the Community Services Department on forms provided by the department and shall include such information as the Director of Community Services deems necessary to review the application. The tree permit form is available on the City website at www.ca.claremont.ca.us/trees.

Any business wishing to acquire a permit for tree planting must provide an official copy of a current City of Claremont Business License at the time of application.

The Community Services Department shall issue the permit if the proposed work is desirable and the proposed method and workmanship are performed to the standards defined under the Maintenance Guidelines described in this Manual. Any permit granted shall contain a date of expiration and the work shall be completed in the time allowed on the permit and in the manner described in it. A permit shall be null and void if its terms are violated.

Permittees shall be required to have a copy of the permit, and a current Claremont Business License (if applicable), present at all times at the work site. Work undertaken by the permittee or their agents may be stopped immediately and the permittee's permit may be revoked by oral or written order of Director of Community Services if it is determined that the program of work or conditions outlined in the permit are not being complied with.

As described in Section 12.26.080 of the Claremont Municipal Code, any fees for permits shall be established by resolution of the City Council.



CONSTRUCTION MANAGEMENT

Section 12.26.090 of the Claremont Municipal Code (Appendix A) and Section 435 of the Land Use and Development Code prescribe protections for pre-existing trees that may be impacted by new development in the City.

Construction damage associated with development, maintenance, or construction taking place around existing trees can be detrimental to tree health. The following construction specifications shall be observed to preserve and protect existing trees located on a site planned for development.

General Site Evaluation. As part of the environmental review for a location planned for development, maintenance, or construction, the Community Development Department shall consult the Community Services Department on the appropriate measures to take regarding trees existing on the project site. Community Services, Community Development, and an ISA Certified Arborist are to identify which trees to protect and which to remove and replace by developing an appropriate work plan. Staff shall develop a plan to protect all trees identified for preservation by establishing a Tree Protection Zone (TPZ) during construction activities. Department staff shall also examine site access and traffic route considerations, excavation limitations, appropriate locations for the piling of soil and debris, and the storage of equipment and vehicles as each of these activities pertain to trees on the project site.

Tree Protection Zone (TPZ). An area surrounding a tree and its critical root zone where no grading, excavation, construction activity, equipment storing, or vehicle parking is to occur. Temporary, protective fencing, made of a material that has high visibility, such as fluorescent-colored, with posts at regular intervals around the tree shall be installed to provide a protective barrier for the critical root zone of each tree. This fencing shall be placed at a minimum distance of fifteen (15') feet from the trunk of the tree or five (5') feet outside the drip line of the tree, whichever distance is greater. No activity shall take place within this fenced in area.

Irrigation in the TPZ. Irrigation should be provided within the TPZ if deemed necessary by an ISA Certified Arborist. If high value trees are within the TPZ, utilizing soil moisture sensors to determine if a tree needs water is ideal. Lacking sensors, drought-adapted species in Mediterranean climates may benefit from one (1") inch to two (2") inches monthly with variation to season and trees species.

Construction Mulching. If department staff determines that traffic encroachment within the drip line of a preserved tree is unavoidable, then a six (6") to twelve (12") inch layer of temporary mulch shall be placed over the affected area to disperse the weight of traffic and equipment for no longer than 30-days or as approved by an ISA Certified Arborist. As determined by an ISA Certified Arborist, a turf paver protection system may be required. Additional weight dispersal and mobility may require the placement of large plywood sheets over the mulched area. Construction mulching and plywood must be removed carefully, so as not to damage the tree, as soon as the required activity within



the drip line of the tree has been completed. Remaining mulch shall be four (4") to six (6") inches away from the trunk, radially, and be two (2") to three (3") inches in thickness post construction activities.

Excavation Requirements. Whenever possible, services such as water lines and utilities shall be routed around the drip line of trees that are being preserved on a site. If department staff determines that excavation within the drip line of a preserved tree is unavoidable, then every effort shall be made to tunnel under or through the tree's root system with a minimal amount of root pruning, rather than to trench across the tree's roots. An alternative method would be the use of an air spade to help reduce the amount of root damage.

All root pruning shall be in accordance with the Maintenance Guidelines established for such activity in this Manual.

Grade Changes. A change of grade around a tree, even well outside of a tree's root zone, can have serious impact on the tree due to soil compaction resulting in reduced aeration or poor drainage.

Development specifications should include requirements to reduce such impacts for trees being preserved with consideration to the type of grade changes to be implemented, tree species, drainage patterns, soil conditions and future irrigation and maintenance plans.

Department staff shall employ the following measures whenever feasible:

Raised Grades. If a grade around an existing tree is to be raised with a backfill less than six (6") inches in depth, then department staff should consider specifying the construction of a tree well as an impact reduction measure. Research continues for effective mitigation measures when the grade around an existing tree is to be raised with a backfill less than six (6") inches in depth. The Soil Management and Trees and Construction ISA BMPs state that implementing vertical mulch or soil aeration methods may dampen the impacts of raising grades around an existing tree. However, each ISA BMP states that neither method is confirmed effective by research. As the arboriculture industry advances, the City should refer to the ISA BMPs as effectiveness of potential methods are validated.

Lowered Grades. If a grade around an existing tree is to be lowered along the side of its root zone, then department staff should consider specifying the construction of a terraced dry wall as a mitigation measure. If a grade around an existing tree is to be lowered along all sides of its root zone, then department staff should consider specifying the construction of a tree island as an impact reduction measure.

GLOSSARY

For the purpose of this manual and the interpretation of regulations, the following definitions shall apply:

ANSI A300: The Section of American National Standards which defines tree maintenance standards for pruning, trimming, and removing trees and palms.

ANSI Z60.1: The American Standard for Nursery Stock. Standardized system providing buyers and sellers of nursery stock with a common terminology, to facilitate commercial transactions involving nursery stock.

Branch Bark Ridge: A raised ridge of bark in a branch that marks where branch and trunk tissues meet and often extend down the trunk.

Callus: Undifferentiated tissue initially formed by the cambium around and over a wound.

Compartmentalization of Decay in Trees (CODIT): The natural process by which trees contain and isolate damaged areas by creating chemical and physical boundaries to limit the spread of disease and prevent further decay.

Co-dominant Branch/ Stem: Forked branches or stems arising from a common junction, having nearly the same size diameter.

Crotch: The angle formed at the attachment between a branch and another branch, leader or trunk of a woody plant.

Crown: The leaves and branches of a tree or shrub; the upper portion of a tree measured from the lowest branches on the trunk to the top including all foliage.

Crown Raising: the pruning of branches to provide vertical clearance below the crown to accommodate for traffic signs and signals, and pedestrian and vehicular traffic. Guidelines for crown raising to provide clearance is detailed below.

Crown Thinning: selective pruning to reduce density of branches and foliage. Thinning shall only be performed when the defined objective is to increase air or light penetration. Contrary to popular belief, crown thinning generally decreases a tree's resilience to high winds.

DSH: The Diameter at Standard Height as measured at 54 inches above the ground is the standard measurement of tree size used by ISA Certified Arborists.

Dead Tree: A tree that is dead, damaged beyond repair, or is in an advanced state of decline as determined by an ISA Certified Arborist.

Declining Tree: A tree that is declining but does not threaten the health of the overall



urban forest. If a tree is declining but not detrimental, tree removal will not be approved.

Drip Line Area: The suggested minimum area for watering within X distance from the trunk of a tree in a typical location, measured from the perimeter of the trunk of the tree at 54 inches above natural grade, where X equals a distance ten times the diameter of the trunk at 54 inches above natural grade, or the distance to the outermost edge of the tree canopy, whichever is the lesser distance.

Emergency Removals: A tree removal is categorized as an Emergency Removal if the tree is deemed a threat to public safety due to its health or structural conditions and its location.

Hazardous Tree: A tree that is an imminent threat to the safety of persons or property. If a tree possesses a structural defect that may cause the tree or part of the tree to fall on someone or something of value, and the condition is determined to be imminent, the tree is considered hazardous.

Injury: A wound resulting from any activity, including but not limited to excessive pruning, cutting, trenching, excavating, altering the grade, paving or compaction. Injury shall include bruising, scarring, tearing or breaking of roots, bark, trunk, branches or foliage, herbicide or poisoning, or any other action leading to the death or permanent damage to tree health.

International Society of Arboriculture (ISA): is a professional association of arborists and tree workers recognized internationally as one of the leading agencies in the research and establishment of high standards for all aspects of tree care.

ISA-Certified Arborist: A person who has demonstrated knowledge and competence by passing a comprehensive exam on tree care to obtain the International Society of Arboriculture (ISA) "Certified Arborist" certification.

Lateral: A secondary or subordinate branch or twig growing from a tree trunk or a larger limb.

Leader: A primary, dominant upright stem, usually the main trunk of a tree that dominates a portion of the crown.

Lion-tailing: Lion-tailing is the over-pruning of a tree by removing an excessive number of inner and lower branches. The resulting tree limbs will appear "long and slender" with a "puff" of terminal foliage at the end like a lion's tail. Lion-tailing increases the risk of branch failure by weakening the tree's root system and eliminating the dampening effect which interior limbs provide when branches flex and bend during storms and high wind events.

Non-Emergency Removals. Removals that qualify for removal but is not addressing an emergency as defined by the criteria of Emergency Removals.



Pollarding: A destructive pruning technique in which the upper branches of a tree are removed using internodal cuts to create a dense head of branches and foliage, typically involving annual pruning. This is common in European urban areas to maintain trees at a predetermined height, rather than allowing them to assume their normal and natural size and shape.

Proactive Removal and Replacement Program: A situation where a group of trees necessitate removal. Removal and replacement is scheduled incrementally over a long time frame with the intent to dampen sudden loss of canopy cover and environmental benefits.

Root Ball: The mass of roots growing from the trunk of a tree, including the surrounding soil.

Root Flare: The junction between the root of a plant and its stem, often indicated by a trunk flare.

Severely Declining Tree: Severe decline of a tree can be caused by many factors including; containing pests or pathogens that cannot be managed or pose a threat to the urban forest, water-stress, decay, compromised root systems, or mechanical injury, where recovery from treatment is determined unlikely.

Tree Care Industry Association (TCIA): Professional trade association whose purpose is to raise the standards of the tree care industry and provide useful services to the public.

Tree health: Refers to the overall condition of a tree, determined by biotic and abiotic factors impacting the tree's growth and productivity.

Tree health inspection: The routine and systematic assessment of a tree with respect to five distinct tree components: roots, trunk scaffold branches, small branches, and foliage. The assessment considers health factors such as insect or pathogen damage, mechanical damage, presence of decay, presences of wilted or dead leaves, and wound closure.

Tree Risk Assessment Qualification (TRAQ): The International Society of Arboriculture's qualification to demonstrate competency in determining risk of trees at the time of inspection through a systematic and methodological process. This qualification identifies tree risk in relation to safety of people and property and considers all risk mitigation methods prior to recommending a tree for removal.

Topping: Topping is perhaps the most harmful tree pruning practice. Topping is the indiscriminate and inappropriate cutting of tree branches to a predetermined crown limit, cutting to stubs or lateral branches that are not large enough to assume the terminal role. Topping is detrimental to the tree's overall health, stability, appearance and necessitates annual maintenance. Other names for topping include "heading", "heading back", "stubbing", "tipping", "hat-racking", and "rounding over".



Utility Arborist Association (UAA): Professional trade association whose purpose is to raise the standards of utility line clearance, while providing the safest conditions possible for line-clearance workers.

Wound: Any opening that is created when the tree's protective bark is penetrated, cut, or removed, injuring or destroying living tissue, exposing the tree to pathogens. Pruning a live branch creates a wound, even when the cut is properly made.

Wound Wood: Differentiated woody tissue, also referred to as a callus roll, which forms after callus tissue has formed around the margins of a wound. Wounds are closed primarily by wound wood.

APPENDICES

Appendix A - Chapter 12.26 of the Claremont Municipal Code

Appendix B - Heritage Tree and Historic Grove List

Appendix C - Designated Street Tree List

Appendix D - Conflict Prevention Methods Before Planting

Appendix E – Resolution Methods for Tree and Infrastructure Conflict

Appendix A

Chapter 12.26 of the Claremont Municipal Code

The Claremont Municipal Code Chapter 12.26 provided below is from September 2024. The most current version can be found on the City website at www.ci.claremont.ca.us/government/municipal-code

Chapter 12.26

CITY TREES

Sections:

12.26.010	Definitions.
12.26.020	Duties of Community and Human Services Commission.
12.26.030	Duties of Director of Community Services.
12.26.040	Duties of private property owners.
12.26.050	Street trees.
12.26.060	Tree planting in subdivisions.
12.26.070	Permits.
12.26.080	Fees.
12.26.090	Protection of City trees.
12.26.100	Interference with Director of Community Services.
12.26.110	Violation-Penalty.

12.26.010 Definitions.

The following definitions shall apply to this chapter.

"Compaction" is the compression of the soil structure or texture by any means that creates an upper layer that is impermeable.

"Designated Street Tree List" means a list of specific tree species which have been designated by the Community and Human Services Commission for each City street, or part of it, as the species of tree to be planted and maintained within the City easement of that street.

"Director" means the Director of the Community Services Department or designee.

"Drip line area" means the suggested minimum area within X distance from the trunk of a tree in a typical location, measured from the perimeter of the trunk of the tree at 54 inches above natural grade, where X equals a distance ten times the diameter of the trunk at 54 inches above natural grade, or the distance to the outermost edge of the tree canopy, whichever is the lesser distance.

"Easement," "parkway" or "right-of-way" means land owned by another over which the City has an easement or right-of-way for street and related purposes. "Parkway" refers to that portion of a street right-of-way, which is available for landscaping, and not for curb, gutter or pavement.

"Heritage trees" are any trees within the City's easement or on City-owned property which have been found to be of significance to the community or of notable historic interest and are so designated by action of the Community and Human Services Commission.

"Maintain" or "maintenance" means and includes root pruning, trimming, spraying, watering, fertilizing, mulching, treating for disease or injury, or any other similar act, which promotes growth, health, beauty and life of any tree.

"Pruning," "trimming" or "thinning" means to reduce the size of a tree using professionally accepted standards, as established by the International Society of Arboriculture (ISA), Tree Care Industry Association (TCIA) or American National Standards Institute (ANSI) Section A300, to control the height and spread of a tree, lessen the wind resistance, preserve its health and natural appearance, produce fuller branching and shaping, aid in disease prevention by allowing more light and air passage within the branches, or make adjustments which will increase its longevity in an urban environment.

"Public tree" or "City tree" means any tree which is located within any public park, City easement, or on any other City-owned property.

"Topping," "heading back," "stubbing" or "pollarding" means a severe type of pruning which usually produces less desirable results than more moderate pruning with respect to the tree's natural form and which is generally hazardous to the overall health and stability of the tree.

"Tree Policy Manual" means a document prepared by the Community Services Department which states policies (approved by the City Council), procedures and other relevant information regarding the selection, planting, maintenance and removal of all City trees.

"Urban forest" or "urban forestry" means the ecology of native and nonindigenous plantings creating a forest in the human living environment, and emphasizing the practice of wise, professional, planned management of all tree resources within an urban area for multiple use and benefit of the entire community.

(07-04; 12-04; 14-07)

12.26.020 Duties of Community and Human Services Commission.

The Community and Human Services Commission serves as the City's tree advisory board. The commission shall:

A. Study the problems and determine the needs of the City in connection with its tree planting and maintenance programs; establish the designated street tree list; approve major changes to the designated street tree list; and hold discussions of tree-related issues at public meetings.

B. Hear and determine appeals from staff decisions regarding street tree removal. The Commission may grant an appeal if it finds that the staff decision would result in a burden on the property owner that substantially outweighs the benefit to the public. The Commission's decision may be appealed to the City Council if a written appeal, setting forth the grounds, is filed with the City Clerk within 10 days of the Commission decision.

If no timely appeal is filed, the decision shall be final.
(07-04; 12-04; 21-06)

12.26.030 Duties of Director of Community Services.

The powers and duties of the Director of Community Services, or designee, under this chapter are as follows:

- A. To designate a particular place within the City easement or on any City-owned property where a City tree will be planted.
- B. To approve minor changes to the designated street tree list; to recommend to the Community and Human Services Commission any major changes to the designated street tree list; and to determine if any change to the designated street tree list qualifies as "major" or "minor."
- C. To draft a tree policy manual that states policies and procedures concerning the selection, planting, maintenance and removal of trees in public places to promote a viable urban forest.
- D. To grant or deny the issuance of permits in accordance with the terms of this chapter.
(14-07; 21-06)

12.26.040 Duties of private property owners.

The duties of any owner of private property whose property has a City easement on it for street purposes are as follows:

- A. To accept, protect and provide adequate water to any City tree planted in the public easement over his or her property, and not to interfere with the City's provision of water to such trees, whether by water truck or other means;
- B. To notify the Community Services Department of any suspected tree hazards or maintenance needs of any City tree on his or her property;
- C. To remove any vines from City street trees planted in the easement over his or her property;
- D. To remove all fallen leaves and other deadfall from any City tree planted in the public easement over his or her property, and to properly dispose of the deadfall in an appropriate waste receptacle.
(07-04; 09-06; 12-04; 14-07)

12.26.050 Street trees.

No tree shall be planted within a parkway other than the species designated as the street tree for that particular street, or portion of a street, by the Community and Human Services Commission. No street tree shall be planted, except by the City, until a tree permit has been issued for it as provided in Section 12.26.070 of this chapter.
(07-04; 12-04)

12.26.060 Tree planting in subdivisions.

Any subdivider of land shall install City trees in accordance with the requirements of Title 16 of this Code and any related resolutions.
(07-04)

12.26.070 Permits.

A. No person shall plant or otherwise disturb any City tree without first obtaining a permit from the Director of Community Services.

B. Applications for permits must be made to the Community Services Department on forms provided by the department, and shall include such information as the Director deems necessary to review the application.

C. Work undertaken by the permittee or his or her agents may be stopped immediately and the permittee's permit may be revoked by oral or written order of the Director when the Director determines that the program of work or conditions outlined in the permit are not being complied with.

D. The Director's decision may be appealed to the Community and Human Services Commission if a written appeal, setting forth the grounds, is filed with the Community Services Department within ten days of the Director's decision. If no timely appeal is filed, the decision shall be final.
(14-07)

12.26.080 Fees.

Fees for permits and appeals shall be established by resolution of the City Council. Any previously adopted resolution establishing fees in relation to prohibited activities shall be repealed.
(07-04)

12.26.090 Protection of City trees.

A. It is unlawful for any person to injure, cut, damage, carve, transplant, prune, root prune or re-move any public tree.

B. It is unlawful for any person to attach, cause to be attached or keep attached to any public tree, or to the guard or stake of a public tree, any rope, wire nails, tacks, staples, advertising posters, decorations, ornaments, flags, toys, swings, lights or any other contrivance whatsoever without first obtaining a permit or explicit approval from the City.

C. It is unlawful for any person to cause or allow any poison or other substance harmful to tree life to lie, leak, pour, flow or drip upon or into the soil within the drip line of any public tree; or set fire or permit any fire to burn when such fire or heat thereof will injure any portion of any public tree; or to operate any equipment, such as mechanical weeding devices, in such a manner as to cause damage to a public tree in any way.

D. No person shall injure any public tree located within an easement or public right-of-

way on his or her private property by neglecting to provide the necessary amount of water, as determined by the Tree Policy Manual and the terms of this chapter, required for said tree's continued good health and viability.

E. No person shall impact the drip line area of a City tree in a way that may reasonably be expected to damage the root system, compact the soil over the roots, or impede free passage of water, air or fertilizer to the roots of any public tree.

F. Special consideration shall be afforded public trees determined by the Community and Human Services Commission to be heritage trees. Such trees shall be removed only when public interest served by removal outweighs the interest in preservation and heritage status.

G. All trees of any species or variety of the genus *Ulmus* which are found to be infected with *Ceratocystis ulmi* (Dutch Elm disease) in the City are a threat and a hazard to all trees of the genus *Ulmus* in Claremont. This section requires that all aboveground portions of such infected trees be destroyed or properly disposed of as provided in this chapter.

H. No person shall possess, store or transport into the City all or any part of the trees of the genus *Ulmus* infected with *Ceratocystis ulmi* (Dutch Elm disease); provided, however, that wood, branches and roots of such trees may be transported either to a safe place for burning or burial, under a minimum of two feet of earth, within five days following the discovery of such infection, or to such sites, and under such conditions, as are approved by the Community and Human Services Commission for the processing and subsequent elimination of the disease hazard. Infected trees may be treated in a manner approved by the County Agriculture Commissioner to effect a cure for the disease if and when an effective cure becomes known.

I. During the construction, repair, alteration, moving or removal of any building, structure of any other type of construction in the City, no person in control of such work shall leave any public tree, shrub or plant in the vicinity of such activity without sufficient guards or protectors as identified in the tree policy manual to prevent injury to the tree, shrub or plant in connection with such construction, repair, alteration, moving or removal. The costs of any such protection shall be borne by the person responsible for the improvement.

(07-04; 09-06; 12-04)

12.26.100 Interference with Director of Community Services.

No person shall hinder, prevent, delay or interfere with the Director or any of his or her agents while engaged in carrying out the execution or enforcement of this chapter. Provided, however, that nothing in this section shall be construed as an attempt to inhibit the pursuit of any remedy, legal or equitable, in any court of competent jurisdiction for the protection of property rights by the owner of any property within the City.

(14-07)

12.26.110 Violation—Penalty.

A. Any violation of this chapter shall be a misdemeanor or infraction at the discretion of the City Attorney or district attorney.



- B. Irrespective of and cumulative to any criminal conviction for a violation of this chapter, the City may, pursuant to Government Code Section 36901, impose a civil penalty in an amount not exceeding one thousand dollars on any person who commits a violation of this chapter. The City may recover the penalty either through an administrative hearing or a civil action brought either by the City Attorney or a designated employee of the City.
- C. Irrespective of whether the City pursues criminal and/or civil action under this chapter, nothing in this chapter shall prevent the City from seeking restitution for damage to City property as an alternative to criminal action and/or civil action to recover a civil penalty in accordance with subsection B of this section.

Appendix B – Heritage Tree and Historic Grove List

Heritage Tree List

Address and Number	Botanical Name	Common Name
1105 N. College Avenue (F4)	<i>Sequoiadendron giganteum</i>	Giant sequoia
Mallows Park (F20)	<i>Leptospermum leavigatum</i>	Australian Tea Tree (removed 2016)
201 W. Eleventh Street (S-2)	<i>Pinus halepensis</i>	Aleppo pine
1101 N. Indian Hill Boulevard	<i>Cedrus deodara</i> (private tree)	Deodar cedar
Memorial Park (P-94)	<i>Cinnamomum camphora</i>	Camphor tree
1102 N. College Avenue (S-3)	<i>Eucalyptus robusta</i>	Swamp Mahogany



Historic Grove List


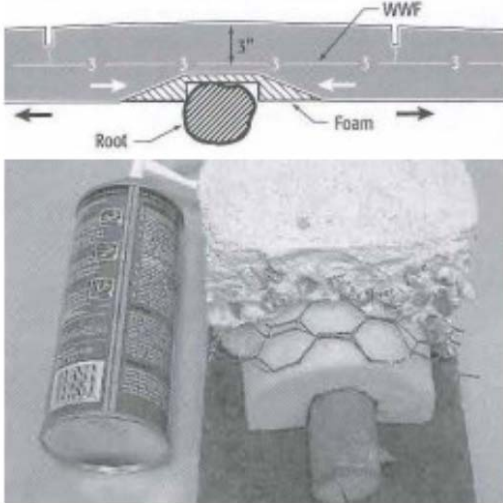
Location and Number	Botanical Name	Common Name
353 – 357 W. Eleventh Street (F1, F1, F1)	<i>Quercus agrifolia</i>	Coast live oaks
N. Indian Hill Boulevard (from Harrison Avenue to Foothill Boulevard)	<i>Ulmus americana</i>	American elms
N. College Avenue (from First Street to Sixth Street)	<i>Eucalyptus spp.</i>	Various species

The Heritage Tree List reflects the current inventory information of each tree. Heritage trees have not changed, rather their inventory identifiers have changed.

**Appendix C –
Designated Street Tree List
(See attachment)**

Appendix D – Conflict Prevention Methods Before Planting



Conflict Prevention Method	Description	Pros	Considerations	Example Image
Curb Extensions (bulb outs)	Extends the sidewalk a short distance, often at an intersection, providing additional pedestrian space and narrowing roadways.	Increases pedestrian safety through traffic calming and shortening crossing distances.	Impacts to drainage and existing utilities, site specific transportation conditions or impacts.	
Suspended Pavement Systems	Pavement supported by and lifted over a void space filled with soil for root growth.	Creates a viable tree site where previously not possible.	Involves removing and repaving sidewalks, considerations for site-specific grading requirements.	

<p>Lowered Tree Sites</p>	<p>A cutout in the sidewalk in which a hole is dug several feet deep, typically with metal grates placed over the hole and around the trunk of the tree.</p>	<p>Prevents soil compaction with reduced pedestrian traffic, enables installation of a tree at a site with limited planting space.</p>	<p>Existence of underground infrastructure, increased maintenance due to accumulation of debris, must include a drainage plan to avoid oversaturation of soil.</p>	
<p>Foam Underlay</p>	<p>A foam layer of support between pavement and existing soil or tree roots.</p>	<p>Help prevent root damage, offers an alternative to root pruning.</p>	<p>Best used to repair damage caused by mature tree roots, short-term solution, not recommended for tree species known to have rapid root growth.</p>	





<p>Modified Gravel Layer</p>	<p>A layer of gravel between pavement and existing soil or tree roots.</p>	<p>Suppressed root growth, more longevity than foam underlay, thickness of gravel around roots can be adjusted to accommodate tree size.</p>	<p>Potential to wound tree roots, increasing susceptibility to soilborne pathogens.</p>	
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Appendix E – Resolution Methods for Tree and Infrastructure Conflict

Resolution Method	Description	Pros	Considerations	Example Image
Pervious Concrete	A high-porosity concrete that allows air and water to reach soil and tree roots.	May reduce stormwater runoff, encourage deeper root growth, reduce root damage to sidewalks, provide better growing conditions.	Requires deeper excavation for installation, requires more maintenance than standard concrete.	
Porous Asphalt	Asphalt pavement which allows water to pass through to soil with a two (2) to four (4) inch thick open-graded asphalt layer.	May reduce stormwater runoff.	Cannot be produced in small quantities, use only when long sidewalk segments are being installed.	





<p>Rubberized Pavers</p>	<p>Pavers made from recycled rubber designed to be more flexible than other sidewalk materials.</p>	<p>More flexible than concrete, provides room for continued root growth.</p>	<p>Requires cutting to fit to size, lift with excessive root growth.</p>	
<p>Decomposed Granite (DG)</p>	<p>Sidewalk material consisting of natural granite pieces that are 3/8 inches or smaller that resembles a combination of gravel and sand.</p>	<p>May be used in place of mulch, provides flexible but walkable surface near tree roots.</p>	<p>Not recommended for busy pedestrian routes, increased level of maintenance due to uneven settling, may require additional binders and regular maintenance to remain ADA compliant.</p>	



<p>Reinforced or Thicker Slab</p>	<p>Concrete reinforced with steel rebar or wire mesh and/ or poured thicker near edges.</p>	<p>Helps resist uplift of tree roots, may be used to correct uplift after other corrective actions have been taken.</p>	<p>May not be compatible with future utility installation, should not be used where additional root growth is anticipated.</p>	
<p>Expansion Joints</p>	<p>Separations between two sections of sidewalk at any interval.</p>	<p>Allow for some movement of concrete, used to control the location of sidewalk cracking.</p>	<p>Not recommended for areas where significant additional root growth is anticipated, short-term solution.</p>	




<p>Tree Pits/ Expanded Tree Pits</p>	<p>Cutout in the sidewalk in which a tree is planted.</p>	<p>Provides space for new plantings where previously not possible.</p>	<p>Must establish minimum sizing requirements to ensure adequate soil volume, difficult to implement in private easement areas.</p>	
<p>Bridging</p>	<p>A panel installed above overgrown tree roots connecting other sections of sidewalk surrounding overgrown roots, creating a slight rise in the sidewalk.</p>	<p>Provides grade separation between tree root zone and sidewalk, allows tree roots to grow in soil, potential materials include concrete or steel panels, may be used to preserve a high value tree.</p>	<p>Site-specific requirements determine if this resolution is feasible, a nonslip surface treatment is required for metal/ steel materials, additional ADA requirements apply.</p>	



<p>Curving or Offset Sidewalk</p>	<p>Modify sidewalk path to accommodate for tree preservation.</p>	<p>Gives trees more growth space, increases pedestrian safety by separating sidewalks from vehicular traffic.</p>	<p>Requires adequate space in the right-of-way, may require collaboration with private property owners, care must be taken to ensure ADA compliance.</p>	
<p>Root Barriers</p>	<p>A physical barrier installed to prevent roots from causing damage to nearby structures or infrastructure.</p>	<p>Deters root growth to limit hardscape damage.</p>	<p>Deters roots where root barrier exists, does not address all tree root issues, not an arboriculture BMP.</p>	



<p>Asphalt</p>	<p>Flexible pavement made of gravel or stone bound together with a waterproof substance.</p>	<p>Low initial cost, more flexible than concrete, easily repaired.</p>	<p>Not widely used due to dissatisfaction with appearance, useful life can vary greatly and can be shorter than concrete, preferred in rural areas.</p>	
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CITY OF CLAREMONT TREE POLICIES AND GUIDELINES MANUAL REVISION

Public Comment Log 3 [December 2024]

Introduction

Dudek worked with the City of Claremont (City) to revise the City's Tree Policies and Guidelines Manual (Manual). The Manual revision ensures alignment with arboricultural Best Managements Practices (BMPs) and urban forestry industry standards, while helping to address community concerns regarding implementation of policies and transparency to the community. **Tables 1-4** summarize the input received throughout project development and are separated based on the timeframe in which input was received. Input received at project initiation up to the Public Comment period are captured in **Table 1**, **Table 2** details the comments received through the Public Comment process, **Table 3** captures comment received after the Public Comment process but prior to **Table 4**, which captures comments received at a community meeting in September 2024. Each table includes a response and if appropriate, a 'revision location' to help easily identify where in the revised draft Manual, the revision can be found. The 'revision location' notes a page number, section title, or paragraph number of the revision reflective of the draft. Public Input received that identify a community concern that is not within the scope of the Manual Revision project, will be brought to City Leadership and Elected Officials at the close of this project. At this time, staff will receive direction from Council on how to address the remaining urban forestry concerns of the community.

Table 1: Community Input – September 2023 – June 2024

The community input process included one (1) Sustainability Committee meeting, three (3) in-person community meetings, individual discussions with community members via phone call or email, and a thorough review of the "2023 Tree Policy Guidelines Manual Review – Community Recommendations" PowerPoint (**Table 1**.) The PowerPoint was shared with the consultant team to inform them of overall urban forestry community concerns at project initiation. All public input received from September 2023 – June 2024 is below.

#	Revision Location	Comment	Response
1-1.	No Revision.	The City should only take direct action in cases of hazardous, dead, and trees where emergency or public safety concern exists.	Comment received. Public safety concern is the primary reason for tree removals.
1-2.	Page 32 Hazardous Tree Inspection; Pages 33 – 38 Non-Emergency Removals	Disease, building damage, hardscape/infrastructure damage and infrastructure conflict should be assessed by a Tree Risk Assessment Qualified Certified Arborist using Level 2 and 3 risk assessments. Recommendations and risk assessment reports should be brought to a Tree Committee for tree removal review and approval or denial.	Comment received. The differentiation between tree health assessment and tree risk assessment was clarified in the project progress document previously distributed as part of this project.

#	Revision Location	Comment	Response
1-3.	Page 27 Tree Care for Birds and Other Wildlife	Trimming schedules should be created such that no tree trimming is to occur during nesting season defined as March 1 through July 31.	Comment received. Revision includes guideline aligning with the Western Chapter ISA Tree Care for Birds and Wildlife Best Management Practices.
1-4.	Page 27 Tree Care for Birds and Other Wildlife	Outside of these dates all trees should be pre-inspected for nests by a wildlife trained arborist (high value habitat) or tree worker with awareness training (low value habitat) as is recommended in the Tree Care for Birds & Other Wildlife Best Management Practices in California document.	Comment received. Manual revision includes guideline to follow the Western Chapter ISA Tree Care for Birds and Wildlife Best Management Practices.
1-5.	Page 27 Tree Care for Birds and Other Wildlife	Regular reports should be given to provide information about pre-inspections and any avian disturbances during trimming periods that documents by raptor and non-raptor as well as disposition – nest replaced, birds sent to shelter, etc.	Comment received. Manual revised to include reporting procedures for avian disturbances.
1-6.	No Revision.	Tree Committee meetings should be scheduled monthly/bimonthly at minimum and not regularly canceled.	Comment received.
1-7.	Page 37 Exhibit 4	Tree removals reports to the Tree Committee should be current and show photo documentation of ALL trees removed before and after.	Comment received. Manual revision includes documentation requirements for non-emergency tree removals.
1-8.	Page 34 Excessive/Reoccurring Property Damage	Tree valuations should be accurately tabulated and represented using current best practices for tree valuation (not just replacement value).	Comment received.
1-9.	No Revision.	Community and Human Services Commission should request of City Council and Manager adequate funding for both staffing expertise and levels.	Comment received.
1-10.	No Revision.	City should demonstrate and communicate Return on Investment to justify appropriate funding for the implementation of our Tree Policy Guidelines/Urban Forest Management Plan.	Comment received.
1-11.	No Revision.	The City should explore shifting urban forest planning and enforcement responsibilities to the Community Development Department. While the physical planting, care and maintenance of City owned trees requires Community Services Department expertise, planning decisions (including those on private property) should be made by staff with planning expertise. Ensuring enforcement would also be the jurisdiction of the Community Development Department.	Comment received.
1-12.	No Revision.	The Community Development Department should develop a Private Property Tree Protection Ordinance requiring permitting and replacement (mitigation) for tree removals based on size/species. The Department should also revise and implements a City Heritage Tree Program. Both are common in other cities.	Comment received. The Heritage Tree program section was retained and the City is committed to continuing this program. The Manual provides a Heritage Tree and Historic Grove List as Appendix B. Development of a Private

#	Revision Location	Comment	Response
			Property Tree Protection Ordinance is beyond the scope of this project.
1-13.	No Revision.	The Community Development Department should implement an ordinance requiring the permitting of pruning of private trees in Commercial and Multifamily properties to protect against hazardous “Topping and Lion Tailing”. Cost recovery permitting fees may be required.	Comment received. See response to comment Table 1 – 12. . Both ‘Topping’ and ‘Lion Tailing’ are listed as prohibited pruning practices within the Manual.
1-14.	No Revision.	The City Community Services and Community Development Departments should jointly work to fund, focus, and report on tasks required to meet the 2020-2025 objectives in the Urban Forest Master Plan.	Comment received. The UFMP lists the Community Development Department as a collaborator on goals benefiting from collaboration.
1-15.	No Revision.	A Commission that has members with environmental expertise should be created that includes a Tree Committee. Another option is that Sustainability Committee could become a Commission with this responsibility. There is precedence as Claremont has had both a Tree/Parkway Commission and Environmental Quality Commission in the past. South Pasadena has a good model with their Natural Resources and Environment Commission.	Comment Received. Addressing the Committee and Commission operational structure is beyond this project’s scope.

Table 2: Public Comment

After an initial Manual revision draft was developed, the Manual was open for Public Comment from June 3, 2024, to July 8, 2024. **Table 2** displays the comments sent to UFMP@dudek.com during the Public Comment period, with a total of 60 comments.

Comment Number	Revision Location	Comment	Response
2-1.	Page 3 – Statement of Commitment Paragraph 4	Page 3, paragraph 4 - add: “and there is no reasonable alternative to resolving the conflict.”	Comment received and text amended.
2-2.	Removed from narrative	Page 3 – paragraph 5 – The paragraph states that a city tree in conflict with infrastructure it will be removed if among other conditions, the costs of infrastructure repair is “greater than the economic value of the tree.” It is not clear on what basis or by whom the economic value of the tree is determined. Further, trees have more than	Comment received and addressed. Economic value no longer mentioned in this passage since natural resources

Comment Number	Revision Location	Comment	Response
		<p>economic value to the community. How much greater does the cost be to justify removal? I find this to be unacceptable. If it is retained, the “economic value of the tree”, costs of alternatives, and an estimate of repair cost are factors that must be included in the documentation. This seems also to be in conflict with the statement on page 5 – Following Guiding Principles “Trees of our urban forest are more than aesthetic enhancements and shall be cared for as a community asset.”</p> <p>Every decision to remove a community tree must be documented in writing using the Proposed Tree Removal Form (sample provided as last page of this document) and available to the public.</p>	<p>transcend western society means of quantifying value.</p>
2-3.	Page 4 Tree Policies and Guidelines Manual	Page 5 – paragraph 3 - replace “should” with “shall” in the next to last sentence. The last sentence in the paragraph is vague. What is the meaning of “underlying intent”?	Comment received. “Should” changed to “shall”. Last sentence removed.
2-4.	No Revision	Page 7 – Second paragraph under The Community and Human Services Commission. The committee would be most effective if its members are familiar with the principles of tree management. If such people are not found in the members of the commission, membership should be opened to a broader group of candidates.	Comment received. The Community and Human Services Commission and Tree Committee selection process is directed by Municipal Code 12.06.020
2-5.	Page 7 The Community Services Department Paragraph 1	Page 8 – paragraph 1 - It is not clear what is meant by “community – facing educational materials”?	Comment received. Language clarified.
2-6.	Page 17 Nursery Stock Standards Bullet 1	Page 16 – First paragraph under Nursery Stock Standards - All nursery stock shall be inspected by an ISA certified arborist employed by the city of Claremont prior to planting for adherence to the standards described in this document.	Comment received. Manual revised to require ISA Certified arborist employed by the city to inspect nursery stock before purchase.
2-7.	No Revision	Page 17 – paragraph after Wood Chip Mulch (and also on page 19) - Having mulch against the trunk has not been found to be harmful according to career-long research by Dr. James Downer of UC Extension.	Comment received. Although Dr. Downer has shared this finding publicly, the Manual revision aligns with ISA Best Management Practices which are not yet revised to state this finding.

Comment Number	Revision Location	Comment	Response
2-8.	Page 18 Tree Planting Specifications Paragraph 6; Page 20 Watering Schedule Paragraph 2, 3, 4, 5, 6; Page 21 Bulleted List	Page 21 – There is nothing to tell the homeowner how often to irrigate newly planted trees, just that it should be frequent. This is open to interpretation and needs to be more specific. Nore is there anything about weather conditions or time of year. There is nothing about how long it takes newly planted trees to become independent of applications to the root ball.	Comment received. Watering frequency and amount updated, as well as seasonal considerations aligning with arboricultural best management practices.
2-9.	Page 20 Watering Schedule Paragraph 6, 7; Page 22 Watering Established Trees Bullet 1, 2, 3, 4	Page 21 – first line on the page - the sentence should read “deliver at least 15 gallons.” This seems excessive for a 15-gallon tree. Add a statement that the water must wet the root ball.	Comment received. Watering quantity amended to arboricultural best management practices. Language added to discuss saturation of the root ball.
2-10.	Page 23 Pruning Paragraph 2, 3, 4, 5; Page 24 – 25 Pruning Mature Trees Bullet 3	Page 24 – In the discussion of Crown Thinning. This pruning specification has been removed from the ANSI A300 2017 standard for pruning. The ANSI Standard noted that the term is frequently misunderstood and is often used to justify poor pruning practices such as lion tailing. The term “thin” remains in the standard but not as a general specification. It may apply to parts of a tree which appear to be too dense, but its use should be rare and limited to specific individual trees and circumstances. It seems to me that crown raising should be included in this section but that it should be limited to preserving pedestrian and vehicle access.	Comment received. Thinning is specified as a pruning technique used only when achieving a specific management objective. Crown raising was added as a pruning method and guidelines for visibility clearance and utility clearance were moved within the section to follow ‘crown raising.’
2-11.	Page 28 Hardscape Paragraph 1	Page 27 – paragraph labeled “Hardscape” – should read “The City will consider and document all options...” See comments on Page 4 paragraph 5.	Comment received. “And document” added.
2-12.	Page 28 Hardscape Bullet 2	Page 28 – paragraph following Root Shaving - should read “the bottom of the new hardscape.”	Comment received. Text amended.

Comment Number	Revision Location	Comment	Response
2-13.	Page 29 Preventing Spread of Disease	Page 28 – paragraph following Preventing the Spread of Disease - There are very few pathogens that can be spread by pruning tools. The pathogen that causes Fusarium wilt of Canary Island palms is the major problem requiring tool sterilization. Otherwise, it is unnecessary. The section also raises the issue of disposal of waste from “diseased” trees. Special treatment should be necessary only when the nature of the disease has been established and the pathogen is known to spread on prunings. It is incorrect to identify a declining tree as diseased without a credible diagnosis. A description of the condition of the tree should be sufficient. Consider also that there are many causes of tree decline that are not related to pathogens or insects.	Comment received. Text amended to specify that these guidelines should be followed only if a tree is identified with a disease that necessitates sterilization of tools or treatment of debris prior to disposal.
2-14.	Page 31 Removal Paragraph 2	Page 29 – second paragraph following Removal - consider and document all feasible mitigation options...	Comment received. “And document” added.
2-15.	Page 30 Removal Paragraph 3	Page 29 – second paragraph following Removal - replanting the same or larger stature tree is an unacceptable expense and would likely require major infrastructure repair.	Comment received. Text amended.
2-16.	Page 34 – 38 detail the operational process for ‘Non-Emergency Removals’ (formerly ‘Standard Removal’)	Page 29 – second paragraph following Removal – The meaning of “standard removal” is not clear. The different public notification requirements referred to should be listed here.	Comment received. Notification procedure for ‘standard/non-emergency’ removals follows the description of non-emergency removals. Format of Manual was revised to provide clarity.
2-17.	Page 31 Emergency Removals	Page 29 paragraph following Emergency Removals – Should read: ... “a threat to public safety due to a hazardous condition and its sensitive location.”	Comment received. Text amended.
2-18.	‘Timely Removal’ category was removed	Page 29 paragraph following Emergency Removals - The meaning of “Timely” removal” is not at all clear. If it isn’t an emergency removal, is it a “non-emergency removal?”	Comment received. Text amended.
2-19.	Page 32 Hazardous	Page 29 paragraph following Emergency Removals - The TRAQ process does NOT designate trees as “hazardous”. The process assesses the level of risk the tree presents, and a manager determines the level of risk that is tolerable.	Comment received. Text amended.

Comment Number	Revision Location	Comment	Response
	Trees Inspection		
2-20.	Page 32 Hazardous Trees Inspection	Page 29 paragraph following Emergency Removals - It is not adequate for a certified arborist to conduct risk assessments using the TRAQ program. The assessment must be performed by a Qualified TRAQ assessor, as is required on page 30.	Comment received. Text amended.
2-21.	No Revision.	Page 30 Paragraph following Dead/Severely Declining Trees. The removal of a tree that is harboring an exotic pest or pathogen that is a threat to the urban forest is reasonable but should be extremely rare.	Comment received.
2-22.	Removed	Page 30 paragraph following Timely Removals – This paragraph should be removed – the material is covered in the paragraph under “Hazardous Trees. There is no distinction between healthy and unhealthy trees in risk assessment.	Comment received. Text amended.
2-23.	Removed	Page 31 paragraph following Public Safety - It is not clear how the removals identified as for “public safety” differs from the list of removals considered permissible on page 30 or under the paragraph dealing with Hazardous Trees.	Comment received. Text amended.
2-24.	Page 31 – 33 Emergency Removals; Page 34 – 38 Non-Emergency Removals	Page 31 Paragraph following Notification Procedures for Emergency Removals – This entire section and Exhibit 1 seem garbled. It should read Public Notification Requirements for Tree Removals. It should then list notification requirements for “Non-Emergency Removals” and state that “No public notification is required for emergency removals.” All removals should be documented with the reason risk is elevated unacceptably and what remediations are rejected. Documentation should be available to the public. Notification for non-emergency removals should be covered in this paragraph. On page 35 that the notification period for non-emergency removals is 15 days. If it is not an emergency, the period should be extended to 30 days following presentation to the Tree Committee at a public meeting.	Comment received. Tree removal information has been clarified, and required supplemental documentation is included. Format was revised for clarity. Response period for ‘Non-Emergency Removals’ was retained as 15-days, however, automating notification methods of ‘Non-Emergency Removals’ will be implemented as a result of this Manual Revision.
2-25.	Revised throughout	Page 31 Paragraph following Standard Removals – change “standard removals” to “Non-Emergency Removals.”	Comment received. Text amended.
2-26.	Page 33 Non-Emergency Removals Paragraph 2	Page 31 Paragraph following Diseased/Insect Infested Trees – The word “Diseased” has no meaning. Tree decline is common, but a definitive diagnosis of a pathogen is rare and there are many reasons why a tree may be in decline without any important pathogen being present. It should be sufficient to describe the tree as being in “advanced decline” unless the cause is known. It could then be removed as a risk to public safety.	Comment received. Text amended.

Comment Number	Revision Location	Comment	Response
2-27.	Page 34 Hardscape/Inf rastructure/ Building Damage	Page 31 Paragraph following Hardscape/Infrastructure/Building Damage – I suggest removing the word “health”. It is very difficult to assess how much root pruning causes sufficient injury to affect tree health. The threat generally is not to tree health, but to tree stability. It should also state that tree removal is considered after all mitigation measures have been considered and documented.	Comment received. Text amended.
2-28.	Exhibits revised throughout	Pages 33 and 34 are unreadable in the downloaded document.	Comment received.
2-29.	Revised throughout	Page 35 Paragraph following Standard Removals - As mentioned earlier, “Standard” should be replaced with “non-emergency.”	Comment received. Text amended.
2-30.	Page 37 Exhibit 4	Page 35 following item 4a and 4b in exhibit 4 – It is not clear who incurs the additional costs.	Comment received. Costs clarified.
2-31.	Page 38	Page 36 following Programmed Tree Removal –This section seems to justify the 2021 initiative to remove all of certain species of trees that resulted in the process to review the Tree Policy and Guidelines Manual. I don’t understand why tree removals under this paragraph are not covered under Non-emergency removals.	Comment received. Section moved to Non-Emergency Removals.
2-32.	Page 47	Page 45 Paragraph following Raised Grades– The ISA BMP for Soil Management, Second Edition states on page 43 that “research has found little benefit from vertical mulching”.	Comment received. Narrative clarified to note nuance.
2-33.	Removed	Page 46 Paragraph following Diseased Tree in the glossary – Many conditions can cause “a deviation in normal functioning that are not associated with a pathogen. Without a differential diagnosis of a pathogen, the conclusion that the tree is “diseased” is inappropriate and can be misused. I suggest removing this from the glossary.	Comment received.
2-34.	Glossary	I suggest adding Programmed Removal (but I am suspicious of this category!), Emergency Removal and Non-emergency Removal to the glossary.	Comment received. Emergency and Non-Emergency Removal added. Programmed Removal was redefined as Proactive Removal and Replacement.
2-35.	Page 33 paragraph 1; Page 37 Notification Procedure	The policy manual needs to contain a description of the contents of periodic reports of tree removals (quarterly reports?) to the tree committee. The categories of removals reported must be consistent with the categories listed in this manual.	Comment received. Text amended in Notification Procedures for Emergency and Non-Emergency Removals.

Comment Number	Revision Location	Comment	Response
2-36.	Required documentation of removals is noted and Standard Forms are being reviewed for implementation.	To document removals, the revised manual should contain a standard form that describes subject trees, the condition that make removal advisable, and the reasons for rejecting possible alternatives to removal. This manual should indicate how long the forms are to be retained and where the public can have access to the them. Documentation and public access are essential. An example of such a form is on the last page of this critique.	Comment received.
2-37.	Categories condensed to 'Emergency Removals' and 'Non-Emergency Removals' throughout	There are far too many categories of tree removals described in the Manual. I noted the following: <ul style="list-style-type: none"> • Programmed removals • Standard removals • Emergency removals • Timely removals None of these are included in the glossary. I recommend simplifying it to two categories, Emergency Removals and Non-emergency Removals.	Comment received. Manual revised to include two categories – Emergency and Non-Emergency. Format was changed to clarify that the remaining subcategories are intended to thoroughly encapsulate all qualifying reasons for tree removals. Definitions added to glossary.
2-38.	Page 37 Exhibit 4	The use of consulting services offered by companies that contract with the City to perform physical arboriculture services invites a conflict of interest and must be avoided.	Comment received. Text modified to clarify that third-party arborist assessment shall occur from a third-party that is not the contracted party for tree removal services at the time of assessment.
2-39.	No Revision	Public disclosure of impending tree actions being of the utmost importance, I have a proposed form on the last page of these comments.	Comment received.
2-40.	No Revision	For the City to ask for public input during its many community meetings and then focus on City liability and safety concerns in its draft changes to the document, leaves many of us feeling that the Community Services Department has been disingenuous about their desire for robust public input. While the summary of changes captures the reason for proposed changes, it doesn't share what the changes to the text are. Excluding the exact changes to the text requires the public to compare the draft with the current document to find what	Comment received. A public meeting will be scheduled after the public comment period. The original schedule was modified in response to community input.

Comment Number	Revision Location	Comment	Response
		<p>changes were made. To do so in a timely manner would require software. Most community members won't make this effort, yet public input on these changes is essential for real improvement and buy-in.</p> <p>To this end, I request that the City provide a redlined copy of the manual so we can see the exact language that is being proposed to be changed, schedule a public meeting to discuss the impetus for these changes and the reason for not taking into account the many community recommendations, and provide additional time for a more thorough review and public comment.</p>	
2-41.	Page 34 - 38 Non-Emergency Removals	The revised final Draft Tree Policies and Guidelines Manual does nothing to address the urban forest management and tree care implementation and process issues that provoked the City's hiring of a consultant to revise the manual.	Comment received. The Manual revisions include an enhancement of communication processes for non-emergency tree removals and a decision-making framework to ensure a systematic assessment is used to determine if a tree is vigorous enough to recover from root pruning while maintaining an acceptable amount of risk.
2-42.	Page 37 Non-Emergency Removals details enhanced communication procedure	<p>Specific to this public comment period, and what will likely be a dearth of comments—which does not reflect the level of community concern for and support for our urban forest—it should be noted that there has been no general notification announcing the existence and availability of the final draft or regarding the public comment period.</p> <p>Now, the first draft to which the public has access or input is already the final draft, so not motivating to community engagement.</p> <p>A few people were informed about the draft and public comment period in an email, in response to a group letter they submitted to Jeremy Swan. But there was no notice sent to the Community Services urban forest/tree interested parties list (I am on the list, have been very active and vocal, and I received no notice of the posting of the draft or the public comment period.), no notice in the local papers, no notice on the City website except on the Trees page that is not evident that it even exists from the home page. The only mention was Page 2 of the 6/6/24 City Manager's weekly report, not even included in its contents list on its page 1.</p>	<p>Comment received. The Public Comment version of the Manual revision is a final 'draft' and is not a finalized document. Edits are typically anticipated to occur after a Public Comment process. The Public Comment period included the following notification methods:</p> <ul style="list-style-type: none"> - Two emails to the interested parties email group - Announced at a City Council meeting by the City Manager - Included in the City Manager's Weekly report <p>This Manual is considered an internal policy and guidelines document and</p>

Comment Number	Revision Location	Comment	Response
			does not follow the same communication protocol as other City efforts that are announced using social media such as a housing element or General Plan process.
2-43.	No Revision	The final draft was not presented as an agenda item to the Sustainability Committee or the Community and Human Services Commission, whose meeting instead was cancelled for "lack of business."	Comment received. The Manual revision is scheduled to be presented at the Sustainability Committee and the Human Services Commission after the public review process.
2-44.	No Revision	The Community Services process throughout has ignored, trivialized and/or misrepresented the concerns raised by the public at meetings in oral and written public comments, and in discussions and written communications directly with staff. And obfuscated about the actual original source of this effort, the recommendation by Jeremy Swan, dated 2/13/23, of mass tree removals of three species, Italian Stone Pine, Red Ironbark Eucalyptus, and Canary Island Pine, based on a level one assessment by West Coast Arborists, the City's contracted tree care company. linked here: https://drive.google.com/file/d/1ZfauCfI52q_05hfsEAnkMX0Is09xKJAo/view	Comment received. The plan referenced in this comment is no longer being considered for implementation. The Manual review was directed by Council as a response to ensure tree maintenance practices meet arboriculture best management practices.
2-45.	Page 33 - 38 Non-Emergency Removals	It's not that the small proposed changes in the draft Manual might not improve the process, but that the existing version of the manual already contained enough information to prevent Jeremy Swan's previously proposed mass removals of Italian Stone Pine, Red Ironbark Eucalyptus, and Canary Island Pine (and withdrawn after public outcry and the critique of both the rationale and data by Dr. Fred Roth, PhD, ISA arborist certification WE161,SAF Certified Urban Forester, ISA Qualified Tree Risk Assessor). linked here: https://drive.google.com/file/d/1LVJc1qTckC8QZAQ_IRyHk8NgT2r7udl4/view	Comment received. The Manual revision enhanced transparency and documentation of assessments for each non-emergency tree removal and added additional methods for third-party assessment of trees.
2-46.	No Revision	The problem has been— and is—with our process and implementation of the already excellent and visionary adopted policies of the City's Urban Forest Management Plan, Tree Policies and Guidelines Manual, and related General Plan Goals and Policies— all of which provide for what should and could be an authentically robust and wise stewardship of our urban forest and protection of its contributions to our community.	Comment received. The Community Services Department work plan for the next two fiscal years includes review of UFMP recommendations to identify items addressed since UFMP development

Comment Number	Revision Location	Comment	Response
2-47.	No Revision	The revised manual still limits all decision making to the Community Service department and staff (and Engineering Dept. regarding sidewalk interface), with no oversight or shared input or recommendation from Community Development Department, which is responsible for implementation of numerous General Plan Goals and Policies listed in the manual, or Sustainability Committee, or any agency outside of the Community Services Department.	Comment received. Items identified for collaboration between various departments are identified in the UFMP.
2-48.	No Revision	The Tree Committee, especially since it is a subcommittee of community members drawn to the Community and Human Services Commission, has no expertise or meaningful role, only receiving and approving reports and recommendations of staff, whose focus is sidewalk and street maintenance and risk avoidance— and from whose perspective, it is true and efficient that by removing the tree, they protect the sidewalk and access to it— and not messy (a cause cited in JSwan’s 2/13/23 recommended removals), no falling limbs or private property damage, etc. No tree= no more problem.	Comment received. The responsibility of oversight of the Sustainability Committee was moved to the Community Services Department in 2019 to address capacity of each department.
2-49.	No Revision	The draft does not reflect the recommendations of the City’s adopted Urban Forest Management Plan, including inter-departmental input and decision making, and which cites the numerous goals and policies beyond sidewalk management that are required for tree care in the context of urban forest stewardship.	Comment received. The Manual is intended to be a policy and guideline document for internal operation processes.
2-50.	Page 37 Exhibit 4	According to the draft, the decisions will be by a City arborist or outside arborist, which therefore could be just the City’s own contracted tree management company, West Coast Arborists— without addressing the community’s first concern that the West Coast Arborists both recommends re tree removal and benefits as it is contracted to do the removals, usually provides replacement trees from its own nursery and sells the harvested wood from removals. That potential conflict of interest has been a concern from the beginning.	Comment received. Text modified to clarify that third-party arborist assessment shall occur from a third-party that is not the contracted party for tree removal services at the time of assessment.
2-51.	Page 37 Exhibit 4	The manual should address how to have qualified opinion beyond what is called for in current draft, in which analysis and recommendations potentially can all be made by the City arborist (with entry level certification) or arborists from the same contractor who benefits from removals— with no requirement for a third party outside consultant.	Comment received. The objection process of tree removals requires a third-party consultant for non-emergency removals. This was further clarified to show the third-party shall not be the contracted party for tree removal services at the time of assessment.

Comment Number	Revision Location	Comment	Response
2-52.	No Revision	Claremont’s Community Services Department used to, but does not, include an qualified and experienced urban forester or any staff whose background is in urban forest municipal management. This should be accounted and compensated for by requiring outside expert opinion and multiple party sign-off before the fact, not just an accounting of already removed trees.	Comment received. The City has two ISA Certified Arborists on staff. Budget has been allocated to allow staff to obtain the ISA Tree Risk Assessment Qualification. However, urban forester education programs or credentialing programs are uncommon among the industry and would require higher education.
2-53.	Page 37 Exhibit 4	<p>The Tree Committee is the only citizen body to have any input into the tree care. Their input should be prior to the fact of removals, not just accounting after.</p> <p>There is no way for a citizen of Claremont whose passion and/or expertise is for trees and our urban forest to apply and serve directly on the Tree Committee— only by serving on the Community and Human Services Commission. Those who serve on the Tree Committee are there because of their interest and efforts as commissioners re community and/or human services.</p> <p>The tree committee members are assigned from the Community and Human Services Commission, expertise or central interest in trees or urban forest— or even attendant concerns of sustainability, ecosystem (birds, etc), or community development— neighborhood character and design, etc.</p> <p>The manual should address the need for a Tree Committee of those who are qualified and highly interested in serving regarding trees/urban forest.</p>	<p>Comment received. The proposed revision contains an enhanced communication procedure and documentation for each proposed non-emergency removal.</p> <p>The Tree Committee selection process is directed by Municipal Code 12.06.020</p>
2-54.	No Revision	The draft Manual prioritizes ADA requirements for sidewalk access, which is not just legally required but an important community value. But the process is not spelled out well enough to provoke creative solutions that protect trees as much as possible from undue trimming of branches or roots or from removal. Who has the circumspect insight and creativity, especially in the absence of input from the Community Development Department, including planning and architecture staff and commissions.	Comment received. Developing a process to innovate creative and collaborative solutions are not within the framework of the Manual.
2-55.	Page 34 Excessive/ Reoccurring	The draft Manual asserts trees can be removed if the value of repair and maintenance exceeds that value of the tree. Every point I have raised in my comments above apply to my concern regarding this criterion/protocol. Who determines the alleged value of the tree, beyond the Community Services Department	Comment received. Text amended.

Comment Number	Revision Location	Comment	Response
	Property Damage	<p>and West Coast Arborists/ How is value determined regarding the trees' contribution to ecosystem, shade, cooling, beauty, neighborhood character, historic preservation, the added property value to the surrounding private properties, etc?</p> <p>And just because it costs more to maintain than to remove a tree should not in itself be justification for removal. What about the economic and environmental cost to the community from the years of lost value of the removed tree while a replacement sapling tree matures enough to have comparable value to the tree that is removed?</p>	
2-56.	No Revision.	The draft Manual does not address the process, implementation and oversight shortcomings that define our current status of tree/urban forest management, and does not reflect the findings and recommendations of the City's Urban Forest Management Plan.	Comment received. This assessment is typically in the form of a program review.
2-57.	No Revision.	The City would be wise to hire Dudek or similar to do the job that is actually needed: review and revision/update of the Urban Forest Management plan— and it's full integration into the implementing tree policies manual, full analysis of how to restructure our processes and procedures to reflect all relevant General Plan Goals and Policies, including consideration of the precedents of past practices— such as full engagement of the Community Development Department, returning the Sustainability Committee to the jurisdiction and staff of the Community Development Department, creation of an authentic Tree Committee— perhaps including members of the architectural and or planning commission, and/or Sustainability Committee, and including the opportunity for community members to serve directly only on the Tree Committee— with members and staff who have expertise and commitment to trees and to the whole of our urban forest.	Comment received. The Community and Human Services Commission and Tree Committee selection process is directed by Municipal Code 12.06.020
2-58.	No Revision.	And at the very least, redesigning our process to require adequate input, and oversight of policies and procedures to allow solutions for sidewalk interface issues, ADA access, and affordability of our community services in coordination and cooperation and integration with the Community Development Department and interested community members. And somehow create a meaningful and responsive communication with the public and respectful attention to community concerns and input.	Comment received.
2-59.	Page 37 Exhibit 4	The draft Manual policies will not address the issues of the status quo that brought us to this moment.	Comment received. The proposed revision increases transparency by enhancing the documentation and

Comment Number	Revision Location	Comment	Response
			communication process for non-emergency tree removals.
2-60.	No Revision.	My concerns about documenting removals left off the need to report circumstances in which trees involved in infrastructure repair are preserved.	Comment received.

Table 3. Post Public Comment

Table 3 details comments received via email after the public comment period closed but were considered for the final draft of the Manual revision. The table below displays the comments sent to UFMP@dudek.com email address after the Public Comment period was closed, with a total of 12 comments. Most comments from the Post Public Comment period did not call for Manual revisions but will be brought to City Council as community concerns regarding the urban forestry program.

Comment Number	Revision Location	Comment	Response
3-1.	No Revision.	I have read the extensive comments submitted to you by [redacted]. I support them and hope that you will take them seriously.	Manual revision included consideration of the extensive comments received throughout the community input process of this project. This Public Comment Log 3 details those comments and responses.
3-2.	Page 33 – 38 Non-Emergency Removals	Claremont has already lost around 2,000 of its “City” trees. Clearly, the existing process isn’t working and needs substantial reform. Revision of the Manual can help if it contains strong provisions which govern decision-making, reporting and oversight.	The Manual revision includes an enhanced Notification Procedures to all Non-Emergency Removals in advance of trees being scheduled for removal. The posted list of proposed removals will include the reason for each removal and photos. The procedure creates a process where interested parties can opt-in to receive an automatically generated email each time a removal list or an update

Comment Number	Revision Location	Comment	Response
			is posted on the City’s website. The webpage will also include the opportunity for community members to object individual tree removals via the website. These enhancements were included as a response to the request for increased transparency and oversight of the urban forestry program.
3-3.	No Revision.	Your response to comments chart states: "Over the next two years, the City will be focusing on evaluating the City’s Urban Forest Management Plan, Claremont Municipal Code, General Plan, and internal policies/procedures to ensure consistency with the updated Tree Policies and Guidelines Manual." Your statement is the same as it has been repeatedly stated during the City Council Priorities and Objectives process and subsequent budget process.	Comment received. City Council has directed staff to address these priorities in the FY 25/26 and FY 26/27.
3-4.	No Revision.	Throughout that process, I repeatedly pointed out in my public comments that our currently adopted policies state that it be the inverse, and simultaneous, not after the fact: "Claremont’s Tree Policies and Guidelines Manual, the Municipal Code, and the General Plan all provide direction on how the urban forest should be enhanced and maintained. The [Urban Forest Management] Plan discusses trends and issues that affect the urban forest and provides a framework to develop a unified and holistic approach to the urban forestry program. In order to promote consistency, these policies should be reviewed and revised simultaneously." —Claremont Urban Forest Management Plan, page 1	Comment received. Revising all components listed was not part of the scope of work. Council directed staff to address the alignment of all urban forestry related policies, documents, and procedures in FY 25/26 and FY 26/27.
3-5.	No Revision.	The Tree Policies and Guidelines Manual is an implementing document of the Urban Forest Management Plan (UFMP) as is stated in the UFMP, which for its own adoption, needed to comply with the existing General Plan Goals and Policies and Municipal Code. Therefore, the tree policies manual should be revised and evaluated for its consistency with those adopted policies, General Plan Goals and Policies and Municipal Code policies and all City implementation processes and procedures, not the other way around as you state: "Over the next two years, the City will be focusing on evaluating the City’s Urban Forest Management Plan, Claremont Municipal Code, General Plan, and internal	Comment received.

Comment Number	Revision Location	Comment	Response
		policies/procedures to ensure consistency with the updated Tree Policies and Guidelines Manual."	
3-6.	No Revision.	Over the next two years, great—evaluate and update the UFMP, General Plan, Municipal Code, internal policies and procedures. Then evaluate the tree policies manual— an implementing document of the UFMP— for <i>its compliance</i> and consistency with all the above. That's what should have happened in the first place— rather than the current tree policies and guidelines revision— after the withdrawal of the Community Services recommendation for mass tree removals to protect sidewalks, in the name of the windstorm. What can be done to correct this crucial point, and reverse the intention to subsume all else to the tree policies manual?	Comment received. This Manual revision was directed by Council.
3-7.	No Revision.	So at least the future two years are spent on review and refinement of all of our urban forest stewardship in toto, not as defined by the tree manual as the foundational policy to which all else must comply? None of my many previous public comments on this same point have had any effect.	At the time of overall urban forestry program review, alignment of the Manual may be included within a scope of work.
3-8.	No Revision.	Or, is the stated policy hopefully just a poorly written description of the City's actual objective, and what is meant is actually what I have been pointing out, i.e., that all urban forest policies and procedures take precedence over the tree policies manual, which should act to implement consistently those adopted policies and procedures?	The UFMP was developed with the intention to be the overall guiding document for Claremont's future urban forest. The UFMP by design, discusses the overall urban forestry program, goals, etc. in a larger context than the Manual. The Manual mainly guides staff in their day-to-day operations while providing avenues for public communication, oversight, and participation. Reviewing the overall program may assist on identifying aspects of the program that may benefit from modification (such as the example provided in comment).
3-9.	No Revision.	Nowhere does the Dudek/City response to comments state in what manner the UFMP policy is implemented of collaboration and collaborative decision-making with other departments, or whether any departments other than Engineering is consulted.	Pages 25 – 33 in the UFMP identify which departments will collaborate for each action to meet each goal listed in the UFMP.

Comment Number	Revision Location	Comment	Response
		What is the role of the Planning Department, Director of Community Development, Planning and/or Architectural Commission, Sustainability Committee? The response to comment chart only says it exists.	
3-10.	Page 34 Excessive/Reoccurring Property Damage	<p>Comment #55, pg 9 of public comment states in part: "The draft Manual asserts trees can be removed if the value of repair and maintenance exceeds that value of the tree....Who determines the alleged value of the tree, beyond the Community Services Department and West Coast Arborists/ How is value determined regarding the trees' contribution to ecosystem, shade, cooling, beauty, neighborhood character, historic preservation, the added property value to the surrounding private properties, etc? And just because it costs more to maintain than to remove a tree should not in itself be justification for removal. What about the economic and environmental cost to the community from the years of lost value of the removed tree while a replacement sapling tree matures enough to have comparable value to the tree that is removed?"</p> <p>The response to comments chart states: "Comment received. Text amended." But the text is unamended. It is the same in both drafts:</p> <p>Draft revision 6/24 draft pg. 32: Excessive/Reoccurring Property Damage. Community Services shall have the authority to remove a tree causing hardscape/infrastructure/building damage if the cost of repairs is greater than the value of the tree or if the cumulative value of repairs outweighs the value of the tree. Trees causing re-occurring damage shall be reviewed for removal and replacement with new tree species appropriate for the location.</p> <p>Draft 9/24, pg. 32: Community Services shall have the authority to remove a tree causing hardscape/infrastructure/building damage if the cost of repairs is greater than the value of the tree or if the cumulative value of repairs outweighs the value of the tree. Trees causing re-occurring damage shall be reviewed for removal and replacement with new tree species appropriate for the location.</p> <p>How is the value determined? What measures will be taken to avoid tree removal and its cost to streetscape, ecosystem, environment, neighborhood character surrounding property values?</p>	Comment received. Text amended to state that the value of each tree will be an estimated value per tree based on species identified by the tree inventory software.

Comment Number	Revision Location	Comment	Response
3-11.	Page 34 Excessive/Reoccurring Property Damage	Please confirm: the City intends to determine the value of a tree only on the economic impact of its maintenance, and justify removal if it is more expensive to maintain than the presumed value of the tree— and based on whose assessment of value based on what criteria?	The City will evaluate the economic impact of reoccurring infrastructure repairs with the estimated value of each specific tree species identified by the tree inventory software.
3-12.	No Revision.	In future, by directing our emails to all essential parties at the City (not just Community Services Department and City Manager) we can begin to address the assertion of the existing Urban Forest Management Plan, i.e., the need for interdepartmental and city-wide engagement in our analysis and implementation of our urban forest policies and processes. So, first addressees logically are City Manager, Director of Community Development, Director of Community Services, City Council Community and Human Services Commission and its Tree Committee, Sustainability Committee, and already identified interested community members, with cc's to Planning and Architectural Commission, Claremont Heritage, Sustainable Claremont. That way, numerous appropriate parties will at least be aware of our ongoing concerns and efforts. And, at best, being so informed will facilitate contributions of all to an inclusive process more aligned with best practices and our adopted UFMP.	Comment received. Effective urban forest management is a collaborative process and communication among all involved groups is encouraged.

Table 4: Community Meeting – September 2024

Table 4 summarizes input from the Community Meeting held on September 18, 2024, at the City of Claremont Council Chambers. The time each comment was made during the meeting is noted for ease of reference. The video recording for this community meeting can be found on the City’s website at: [Tree Policies and Guidelines Manual - Community Meeting - Sep 18th, 2024](#).

Comment Number	Comment (Summarized)	Time	Revision Location	Response (Summarized)
4-1.	The Manual revision included Tree Protection Zone and ‘right tree, right place’ standards. Are you suggesting that there	10:33	No Revision.	The arboriculture industry has advanced, and the Manual was updated to align with the current arboriculture industry standards. For example, historically, mitigating each removed tree by planting a new tree was a

	was nothing in the Manual that spoke to that objective?			common practice. Utilizing the canopy cover loss from a removed tree and aiming to plant trees that will replace the lost canopy cover is seen as an effective method to maximize the canopy cover of individual planting site.
4-2.	What is the definition of a “declining tree?” In my mind, in an emergency removal a “Declining” tree is in danger of creating a problem and it’s not going to recover, is that your definition as well?	16:18	Page 32 Emergency Removals	A tree health assessment will be performed for each tree that may qualify for removal as a “Dead/Severely Declining” tree. This assessment identifies if a tree is in an advanced state of decline or damaged beyond repair, where a tree will likely not recover. A “Dead/Severely Declining” tree may qualify as an Emergency Removal. The different applications of assessing tree health and tree risk were discussed throughout this project. If a tree is determined to have a level of risk beyond the risk tolerance level of the City, and all feasible risk mitigation methods would not lower the risk to an acceptable level, the tree would fall under “Hazardous Tree” which qualifies as an Emergency Removal.
4-3.	Will ‘hazardous trees’ be assessed by a qualified risk assessment individual? The current edit only notes ISA Certified Arborist.	17:24	Page 33 Hazardous Tree Inspections	Yes, hazardous trees will be evaluated by an ISA Tree Risk Assessment Qualified Arborist. The next FY budget includes funding for staff to get TRAQ qualified. Both Hazardous and Dead/ Severely Declining trees will be assessed by an ISA Certified Tree Risk Assessment Qualified Arborist.
4-4.	When a Tree Risk Assessment is performed, the level of risk should be in the documentation.	20:29	Page 32 Hazardous Tree Inspections	The ISA Tree Risk Assessment form includes the identified level of risk. In the Manual revision, a tree being removed for an unacceptable level of risk will be considered an emergency removal. However, if a tree with an unacceptable level of risk is mitigated to an acceptable level of risk, the tree will not be proposed for removal but documentation of the TRAQ report will be retained.
4-5.	How is “rapidly declining” defined when a tree is recommended for removal? There should be timeframe parameters to monitor the rate of decline.	23:35	Page 33 Declining Trees	Comment received. Text amended to remove ‘rapidly’ as there is no industry standard. ‘Dead/Severely Declining’ are retained under Emergency Removals.
4-6.	The current removal process is: staff brings proposed removal and replacement to the Tree Committee, the Tree Committee votes to support the removal, then it goes to the commission. This is a 2-3-month process for something that is not an emergency. Is	28:10	Pages 33 – 38 Non- Emergency Removals	The current Notification Procedure for Dead, Diseased, or Hazardous removals and replacements is to present the list of removals and replacements to the Tree Committee, post-removal. The proposed revision modifies this process. Instead of the Tree Committee receiving the list of removals and replacements after trees are

my understanding correct that the proposed Notification Procedure in the Manual for Non-Emergency Removals, will now be that: proposed removals are listed on the website, the list will be sent to community members who 'opt in' to the email notification, and then the community only has 15 days to comment. Meaning, the 2-3 month process is not being shortened to 15 days?

removed, the City will post the list of proposed removals, with photos and reason for removal prior to removing trees, on the City website with 15 days for the public to object any proposed removals. If a proposed removal is objected, the City will provide additional documentation for the objected removals. Select proposed removals will still be brought to the Tree Committee in addition to the proposed Notification Procedure, the categories of tree removals was modified from Dead, Diseased, or Hazardous trees to Emergency Removals and Non-Emergency Removals, only.

If a tree is a Non-Emergency Removal, the tree is not identified as potentially hazardous, not dead, and therefore, does not qualify as an Emergency Removal. If the City is notified of a tree concern, the City's ISA Certified, Tree Risk Assessment Qualified, Arborist will prepare an Arborist Report or perform a TRAQ assessment. Whether an Arborist Report of TRAQ assessment is appropriate will be determined on a case-by-case basis, by design.

This means, each situation will first determine if the concern is related to tree risk or tree health. In both situations, all risk mitigation/conflict resolution efforts will be considered, with the goal to preserve as many trees possible, prior to proposing a tree as a Non-Emergency Removal.

When a tree conflicts with infrastructure, the City will consider all feasible conflict resolution methods and evaluate if the tree is healthy enough to recover from construction impacts involved in conflict resolution. If the tree is healthy enough to recover from construction impacts, conflict resolution methods shall be implemented.

If a tree and infrastructure conflict exist and the tree needs to be removed (i.e. gas line), the tree will follow the Non-Emergency Removal Notification Procedure, which allows the community an opportunity to object and request further documentation.

All proposed Non-Emergency Removals will be posted on the City website, an automatic email notification will be sent to all interested parties, and the Non-Emergency Removals Notification procedure will follow.

4-7.	The community is concerned with excessive tree removals and lack of protection for mature trees when conflicts with infrastructure occur. Respectfully, I do not see posting something on the website as being even close to effective in terms of our concerns, which were infrastructure-related removals. Infrastructure removals are highly subjective as it is easier to remove a tree than continue to mitigate a tree and infrastructure conflict. The Tree Committee was established to ensure the community was informed of tree-related issues. I am concerned that this 15-day process and notification are seen as the solutions to community concerns, which the community does not feel is adequately addressed through this Manual revision.	31:24	Pages 33 – 38 Non-Emergency Removals	The Manual revision is an enhancement to the current reporting of removed trees. The City is aware the community’s concerns are not fully addressed through this Manual revision and evaluating policies for tree protection is requested. The Council has directed staff to address actions listed in the Urban Forest Management Plan and this concern will be addressed through this process.
4-8.	The 15-day notification period seems too short to me. If it’s a non-emergency removal, why can’t that be extended to 30 days? What is the justification for 15 days?	34:00	No Revision.	<p>When the City considered the request to increase the public objection period to 30-days, it was identified that a Non-Emergency Tree Removal may be left standing for up to 90- 120 days, which is beyond a sufficient level of customer service as determined by the City.</p> <p>From a service standpoint, residents requesting tree removal see this as a timely issue. When receiving this request, we explain the timeline of the process, which we anticipate being unsatisfactory to some residents who believe this is a timely request. The recommendation for the 15-day public comment period is, truly from a customer service standpoint and meeting operational logistics.</p>
4-9.	The situation described, where a resident is requesting a tree to be removed, has traditionally always gone to the Tree Committee for public comment, at least they should have.	35:48	Pages 33 – 38 Non-Emergency Removals	<p>Historically, for regular sidewalk work, if root pruning or root removal would jeopardize the stability of the tree, those were considered emergency removals and would be removed to repair infrastructure.</p> <p>In the Manual revision, unless circumstances qualify this removal as an Emergency Removal, these trees are categorized as Non-Emergency Removals, and will follow the proposed Non-Emergency Removals Notification Procedure.</p>

				If residents who request infrastructure related work on private property impacting a healthy City tree, and the resident requests the tree to be removed, the request will be heard by the Tree Committee, which retains the current procedure.
4-10.	The Non-Emergency category may leave room that allows the City to bypass these processes. The 15-day public comment period is too short and is restrictive for community members to provide input.	37:26	Pages 33 – 38 Non-Emergency Removals	The City modified their current process to allow for pre-removal public notification and an opportunity for objection by following the revised Notification Procedure for Non-Emergency Removals. Cities approach removal notification in many ways and only cities with staff capacity can provide prior notice to removals.
4-11.	Can you confirm the Notification Procedure includes contacting interested individuals as done in the past?	40:16	Page 37 Exhibit 4	Yes, an automated email will be sent to interested parties through the City website when a removal request is posted.
4-12.	Is there a definition of what consists of a structural conflict? There have been instances where tree removals have been requested due to individuals seeing a tree as a nuisance due to debris... Is infrastructure defined as something that has to do with the road or the sidewalk being dangerous or being difficult to traverse?	51:13	No Revision.	The City defines infrastructure as hardscape. Nuisance debris was retained in the Manual revision as NOT a qualifying reason to remove a healthy tree.
4-13.	The City’s policy works well and the Tree Committee was created to provide the transparency of how these policies are being implemented. I am concerned that community input will be removed from this process to optimize operational efficiency when the purpose of these policies and committees is for the City to be transparent in how they are implementing the policies that align with community values, and is not compromised for efficiency.	55:04	No Revision.	The City sees value in the Tree Committee, however, addressing the Tree Committee is out of the scope of this current project. As we start the public review process of this project, which goes through tree committee, commission, and council, staff will include the public comments received in the final presentation we give to Council. At that time, we will get direction from Council on staff direction. The City must abide by this process to address the Tree Committee concerns as the Tree Committee parameters are housed in the municipal code. Should the City Council direct staff to change the municipal code, there will be a separate analysis and engagement process. The engagement process to change a municipal code would ask the community, ‘what would the Tree Committee look like?’ to ensure the intent is being addressed. This Manual, the UFMP, the General Plan, and the municipal code are all components that help manage the urban forest and Council has directed staff to align all urban forestry materials.
4-14.	The process really ought to be a Tree Committee that’s stands alone and you ask for community members who want to participate, and have a desire and want to	55:04	No Revision.	

	participate in tree policies, and I don't see any action here to do anything like that.			
4-15.	The term "declining, diseased, or dead" the term "diseased" it might be reflected... So if you're saying "declining" what's the difference from diseases?	1:02:45	No Revision.	The word 'disease/d' is only retained to discuss biodiversity and fostering an urban forest that is resilient to known diseases (pg 5), discussion on species diversification (pg 11), Claremont's Designated Street Tree List and biodiversity (pg 12), quality trees and nursery stock (pg 13, 18), watering and pruning practices to avoid disease (pg 23), sanitization of tools (pg 29), 'Pest and Disease Management' and 'Integrated Pest Management' (pg 30), glossary definition for CODIT, and Appendix A Chapter 12.26 of the Claremont Municipal Code. The Municipal Code will be evaluated as per direction of Council. Changes to text in the municipal code is not within the Manual revision project.
4-16.	The concept of Programmed Removals should not be an addition to this revision.	1:06:12	Page 38 Proactive Removal and Replacement Program	<p>The Programmed Removals concept is retained from the Manual and not an addition from this revision. The City currently implements the Programmed Removals concept when appropriate. This includes, the liquidambar removal and replacement program and ash tree removal and replacement program. These programs were approved and are already in place. The species in the approved 'Programmed Removals' are assessed every year. We use these programs to manage species with predicted challenges such as ash aging out of the City needing replacement with younger trees. Each removal is replaced and replanted with suitable street trees. When we remove mature pine trees to make infrastructure improvements, the City replants each viable site with more appropriate street trees for that area.</p> <p>When 'Programmed Removals' are proposed, the current process requires a recommendation from Tree Committee and approval from the Commission to implement this plan. The liquidambar project was approved by City Council.</p> <p>As part of the Manual revision, we will include that Programmed Removals must be recommended by the Tree Committee and approved by the Commission, and approved by City Council.</p>
4-17.	If someone has ADA concerns, they should repair the street and the sidewalk effectively to resolve the ADA issues. This is why the community is requesting further transparency measures. We want to ensure	1:09:48	Pages 35 Exhibit 2 and Page 36 Exhibit 3	The current language in the Manual for 'Programmed Removals' is 'Tree Removal and Replacement Program.' This concept was not added to the Manual but has been retained in the Manual throughout revisions. The verbiage describing this concept was expanded to provide further context and clarification. The Revision Location points to an illustrated 'Tree and

	decisions were made as the policies were intended to be implemented. We want to ensure decisions for tree removal were not made for convenience, healthy trees are not removed if an infrastructure conflict can be mitigated and a tree retained.			Infrastructure Conflict Resolution Feasibility Chart.’ These decision-making charts <u>first</u> considers the health condition of the tree. Conflicts where trees are in ‘Fair’ or ‘Good’ health condition will first consider all potential conflict resolution methods prior to considering removal.
4-18.	I’m not saying there isn’t a reason to have a program for tree removal for a tree species, I’m not suggesting we never have it, but it should be a separate issue rather than part of the tree policies and procedure Manual, as they are completely different tasks.	1:13:53	Page 38 Proactive Removal and Replacement Program	<p>The verbiage in the Manual only allows staff to take a “Programmed Removal” project proposal through the public process. Staff does not have the ability to implement a ‘programmed removal’ project without review from the Tree Committee, the commission, and ultimately approval from the City Council.</p> <p>There is existing documentation of ‘Programmed Removal’ project proposal which shows that the public process was followed, which included community workshops, public comment period, tree committee, commission, and Council. The transparency parameters are outlined in this process and the Manual ONLY gives staff the ability to propose a program to go through the community process.</p> <p>The Programmed Removals revision does not include additional changes beyond renaming the section to ‘Proactive Removal and Replacement Program,’ and framing the concept with a more thorough narrative. Additional changes may be requested on a case-by-case basis. Case-by-case changes will NOT modify the public process parameters required to implement a Programmed Removal project.</p> <p>The Manual will be revised to provide further context on the public process associated with Programmed Removals.</p>
4-19.	What information is going to the Tree Committee on the 16 th and what of this input is going to be included in that?	1:25:15	No Revision.	After this meeting, the City will meet with Dudek, the Community Development Department, and the City Manager’s office. All comments received at this meeting and throughout the project will be taken into consideration for the Manual revision. If there are major changes, another public draft may be released. When presenting a recommendation to adopt the Manual revision, staff will include any additional information that was been presented throughout the process. This will include, for example, Tree Committee selection parameters. The dates for the meetings are tentative and may be postponed, as they have been throughout this project, as a response to community input.

4-20.	Page numbers didn't align in the Public Draft.	1:27:43	'Revision Location' column for Public Comment Log	Page numbers noted in public comments will be adjusted to align with where the revision took place in the next draft of the Manual.
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Dawn Ross

Importance: High

From: Geza Barnabas Path [REDACTED]
Sent: Thursday, January 16, 2025 4:52 PM
To: Dawn Ross <dross@claremontca.gov>
Cc: Jeremy Swan <jswan@ci.claremont.ca.us>; Frederick Roth [REDACTED]; Drew Ready [REDACTED]; Bob Gerecke [REDACTED]; news@claremontcourier.com
Subject: RE: 01-16-25 Community and Human Services Commission Special Meeting Agenda
Importance: High

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

I apologize in advance for not being present at the commission meeting and for being unable to address this proposed change at the Tree Committee.

Furthermore, I wish I had more time to address my key points, but I do not, nor do I feel it would be of any use at this level, no offense.

I categorically oppose the bulk of the proposed changes to the Claremont Tree Policies & Guidelines. These are not simple updates. Please understand that what has been proposed – rather, pushed through – is a significant change to the manner that Claremont has approached operations and governance per the current policies. This change diminishes community oversight and removes key elements that checked individual departmental actions.

Key Points:

- We have repeatedly asked what is wrong with the current process that has served our community well for more than a decade. The answer appears to be an attempt to streamline department actions and loosen and centralize decision making at the departmental level rather than community oversight.
- The same individuals that proposed a disastrous and short-sighted response to our famous windstorm want the community to give them greater latitude to make decisions. I do not believe adequate competency has been exhibited to date to warrant such trust.
- Curiously, after community outcry stopped the proposal to remove thousands of trees for “infrastructure protection” our city employees decide that the Tree Policies needed an “update”.
- Nearly all suggestions by community groups over the past two years have been brushed aside in the interests of providing the department great latitude when addressing “infrastructure conflicts” at the expense of protecting our Urban Forest.

I’m running out of time; I’m deeply disappointed I’ve been unable to more clearly express my concern that the citizens of Claremont are not being well served by this proposal. Certainly, the department benefits, and perhaps certain special interests, but clearly not the community that is supposed to be served. The expense that has been wasted on this exercise will be the least of what we lose.

It should be noted that not one community member has risen to support this proposed change nor explain why they feel it is necessary while dozens have opposed or commented during the multiple meetings that have been held. Yet somehow, the original proposal is now being presented, essentially unchanged.

Thank You,

Barnabas Path, Account Executive
[REDACTED]

Jamie Costanza

From: jcostanza@claremontca.gov
Subject: FW: Public Comment on Tree Policies and Guidelines Manual City Council Agenda Item

From: [REDACTED]
Date: January 23, 2025 at 12:46:56 PM PST
To: Shelley Desautels <sdesautels@ci.claremont.ca.us>
Subject: Public Comment on Tree Policies and Guidelines Manual City Council Agenda Item

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To the City Council, City Manager, Director of Community Services Department, Director of Community Development Department, and Community and Human Services Commissioners:

Revision of the Tree Policies and Guidelines Manual in itself does nothing to address the real needs of our urban forest.

The previous/existing Tree Policies and Guidelines Manual was sufficient to preclude Jeremy Swan's/Community Services Department recommendation to remove three species of trees in response to the windstorm.

Yet, the City's response to community outcry opposing the removals has only been to revise the Tree Policies and Guidelines Manual. There still isn't even an authentic Tree Committee to allow community members to serve specifically for the urban forest--- still only as subcommittee members who serve on the Community and Human Services Commission.

There has been no attention given to repeated public comment regarding **the need for structural change in the implementation of existing adopted policies and processes**, which has been stated by members of the public for years now, variously to the Tree Committee, Community Services Department staff, Community and Human Services Commission, City Manager, City Council, and in the public forum of the Courier and social media.

The City's already adopted Urban Forest Management Plan states the need for multi/interdepartmental and public engagement in our urban forest management. In particular, Community Development Department should be the hub of such responsibilities. Numerous Goals and Policies of our General Plan also support integrated decision making for urban forest planning, care and protection.

The City Council's currently adopted Priorities and Objectives (therefore budget) includes attention to urban forest management planning and implementation. Addressing the particulars of process and implementation is the only path to see, and protect, the forest for the trees.

For one example of previously asserted public comment, which also more fully details some concerns, below is an excerpt of public comment I submitted September 2024, during the public comment period on the draft Tree Policies and Guidelines Manual:

"Public Comment re final draft Claremont Tree Policies and Guidelines Manual:

The revised final Draft Tree Policies and Guidelines Manual does nothing to address the urban forest management and tree care implementation and process issues that provoked the City's hiring of a consultant to revise the manual.

*Specific to this public comment period, and what will likely be a dearth of comments— which does not reflect the level of community concern for and support for our urban forest— it should be noted that there has been no general notification announcing the existence and availability of the final draft or regarding the public comment period....
...The Community Services process throughout has ignored, trivialized and/or misrepresented the concerns raised by the public at meetings in oral and written public comments, and in discussions and written communications directly with staff. And obfuscated about the actual original source of this effort, the recommendation by Jeremy Swan, dated 2/13/23, of mass tree removals of three species, Italian Stone Pine, Red Ironbark Eucalyptus, and Canary Island Pine, based on a level one assessment by West Coast Arborists, the City's contracted tree care company.*

linked here:

https://drive.google.com/file/d/1ZfauCfI52q_05hfsEAnkMX0Is09xKJAo/view

It's not that the small proposed changes in the draft Manual might not improve the process, but that the

existing version of the manual already contained enough information to prevent Jeremy Swan's previously proposed mass removals of Italian Stone Pine, Red Ironbark Eucalyptus, and Canary Island Pine (and withdrawn after public outcry and the critique of both the rationale and data by Dr. Fred Roth, PhD, ISA arborist certification WE161, SAF Certified Urban Forester, ISA Qualified Tree Risk Assessor).

linked here:

https://drive.google.com/file/d/1LVJc1qTckC8QZAAQ_IRyHk8NgT2r7udl4/view

The problem has been— and is—with our process and implementation of the already excellent and visionary adopted policies of the City's Urban Forest Management Plan, Tree Policies and Guidelines Manual, and related General Plan Goals and Policies— all of which provide for what should and could be an authentically robust and wise stewardship of our urban forest and protection of its contributions to our community.

The revised manual still limits all decision making to the Community Service department and staff (and Engineering Dept. regarding sidewalk interface), with no oversight or shared input or recommendation from Community Development Department, which is responsible for implementation of numerous General Plan Goals and Policies listed in the manual, or Sustainability Committee, or any agency outside of the Community Services Department.

The Tree Committee, especially since it is a subcommittee of community members drawn to the

Community and Human Services Commission, has no expertise or meaningful role, only receiving and approving reports and recommendations of staff, whose focus is sidewalk and street maintenance and risk avoidance—and from whose perspective, it is true and efficient that by removing the tree, they protect the sidewalk and access to it—and not messy (a cause cited in JSwan’s 2/13/23 recommended removals), no falling limbs or private property damage, etc. No tree= no more problem.

The draft does not reflect the recommendations of the City’s adopted Urban Forest Management Plan, including inter-departmental input and decision making, and which cites the numerous goals and policies beyond sidewalk management that are required for tree care in the context of urban forest stewardship.

According to the draft, the decisions will be by a City arborist or outside arborist, which therefore could be just the City’s own contracted tree management company, West Coast Arborists— without addressing the community’s first concern that the West Coast Arborists both recommends re tree removal and benefits as it is contracted to do the removals, usually provides replacement trees from its own nursery and sells the harvested wood from removals.

That potential conflict of interest has been a concern from the beginning.

The manual should address how to have qualified opinion beyond what is called for in current draft, in which analysis and recommendations potentially can all be made by the City arborist (with entry level certification) or

arborists from the same contractor who benefits from removals— with no requirement for a third party outside consultant.

Claremont's Community Services Department used to, but does not, include an qualified and experienced urban forester or any staff whose background is in urban forest municipal management. This should be accounted and compensated for by requiring outside expert opinion and multiple party sign-off before the fact, not just an accounting of already removed trees.

The Tree Committee is the only citizen body to have any input into the tree care. Their input should be prior to the fact of removals, not just accounting after.

There is no way for a citizen of Claremont whose passion and/or expertise is for trees and our urban forest to apply and serve directly on the Tree Committee— only by serving on the Community and Human Services Commission.

Those who serve on the Tree Committee are there because of their interest and efforts as commissioners re community and/or human services.

The tree committee members are assigned from the Community and Human Services Commission, expertise or central interest in trees or urban forest— or even attendant concerns of sustainability, ecosystem (birds, etc), or community development—neighborhood character and design, etc.

The manual should address the need for a Tree Committee of those who are qualified and highly interested in serving regarding trees/urban forest.

The draft Manual prioritizes ADA requirements for sidewalk access, which is not just legally required but an important community value. But the process is not spelled out well enough to provoke creative solutions that protect trees as much as possible from undue trimming of branches or roots or from removal. Who has the circumspect insight and creativity, especially in the absence of input from the Community Development Department, including planning and architecture staff and commissions.

The draft Manual asserts trees can be removed if the value of repair and maintenance exceeds that value of the tree. Every point I have raised in my comments above apply to my concern regarding this criterion/protocol. Who determines the alleged value of the tree, beyond the Community Services Department and West Coast Arborists/ How is value determined regarding the trees' contribution to ecosystem, shade, cooling, beauty, neighborhood character, historic preservation, the added property value to the surrounding private properties, etc?

And just because it costs more to maintain than to remove a tree should not in itself be justification for removal. What about the economic and environmental cost to the community from the years of lost value of the removed tree while a replacement sapling tree matures enough to have comparable value to the tree that is removed?

The draft Manual does not address the process, implementation and oversight shortcomings that define our current status of tree/urban forest management, and does not reflect the findings and recommendations of the City's Urban Forest Management Plan.

The City would be wise to hire Dudek or similar to do the job that is actually needed: review and revision/update of the Urban Forest Management plan— and it's full integration into the implementing tree policies manual, full analysis of how to restructure our processes and procedures to reflect all relevant General Plan Goals and Policies, including consideration of the precedents of past practices— such as full engagement of the Community Development Department, returning the Sustainability Committee to the jurisdiction and staff of the Community Development Department, creation of an authentic Tree Committee— perhaps including members of the architectural and or planning commission, and/or Sustainability Committee, and including the opportunity for community members to serve directly only on the Tree Committee— with members and staff who have expertise and commitment to trees and to the whole of our urban forest.

And at the very least, redesigning our process to require adequate input, and oversight of policies and procedures to allow solutions for sidewalk interface issues, ADA access, and affordability of our community services in coordination and cooperation and integration with the Community Development Department and interested community members. And somehow create a meaningful

and responsive communication with the public and respectful attention to community concerns and input.

The draft Manual policies will not address the issues of the status quo that brought us to this moment."

Dear Council, please take action to establish an ad hoc process to consider all aspects of excellence in implementing the City's adopted General Plan Goals and Policies and adopted urban forest policies for protecting and nourishing our urban forest, for our environment and all its species, and for the beauty and well-being of our community.

Thank you for your consideration of my concerns.

Jennifer Jaffe

Claremont resident for 55 years

I am deeply troubled that the final draft of Claremont's Tree Policy and Guidelines Manual did not change the process by which the City of Claremont selects nursery trees provided by contractors to be planted in the urban forest. I have previously made my concerns known in writing during the Policy revision process, at meetings of the Tree Committee and in-person to Jeremy Swan.

It is of the greatest importance that, as Claremont restores its urban forest, it ensures that the nursery trees it uses meet the requirements listed on pages 17 and 18 of the Manual. The most important among those requirements is **freedom from circling and girdling root systems** which are very common in containerized trees. The most effective and efficient way to prevent the planting of defective trees provided by a contractor is to require an inspection of the nursery stock by a qualified arborist employed by the city **prior to planting**. The inspection process is simple and quick. But the final draft of the revised manual does not contain this requirement. The passage below is an extract from the final draft that discusses the city's process for insuring quality stock is planted:

“The City shall reserve the right to refuse any nursery stock that does not meet these standards and may require any person who has planted such sub-standard trees, on City property or within City right-of-ways, to have these trees removed and replaced at that person's own expense.”

If the City doesn't require preplant inspection, when would they ever identify substandard trees? Furthermore, once a tree has been it is highly unlikely that the tree would be removed and replaced. I know this to be true because I have seen 5 trees planted by contract in the Guadalajara neighborhood in the past three years where a close friend lives. Four of these trees had demonstrably bad root systems at planting, but one has been replaced, and only after I raised concerns about its disabled roots. The other three are still in the ground.

There are many other concerns that have not been addressed by the revision, but my concern about the nursery stock being planted is transcending. If Claremont desires a healthy and **safe** urban forest it is essential that nursery stock be routinely inspected prior to planting.

Fred Roth, Ph.D.

Faculty Emeritus, Cal Poly Pomona

Certified Arborist, ISA

Certified Urban Forester, SAF

Honorary Life Member, Western Chapter International Society of Arboriculture

Editor, Trees Recommended for Southern California

CITY OF CLAREMONT TREE POLICIES & GUIDELINES MANUAL REVIEW

The following is a DRAFT summary of revision recommendations for the City of Claremont’s Tree Policies and Guidelines Manual (Manual). Recommendations consider industry standards, International Society of Arboriculture (ISA) best management practices (BMPs), and consideration of community values. This is a DRAFT of recommendations discussed with the City and the community, provided in an effort to increase transparency and clarity for the various potential revisions and their context.

1. Manual Revision – From Review

The following items for revision were identified by the consultant’s initial review of the Manual. Recommendations for revision are provided below.

Revision Item	Revision Recommendation	Details of Revision
Specifying standards to industry/ISA BMPs	Specify standards within Manual	Include specifics of which standards are to be followed. To include: International Society of Arboriculture (ISA), American National Standards Institute (ANSI), American Horticulture
Expand maintenance practices	Nursery stock, nursery stock inspection	Detail standards to match current BMPs
	Upon planting, consider feasible tree infrastructure conflict resolutions.	Some resolution measures can only be installed upon planting. Considering feasible resolutions upon installation, minimize future tree and infrastructure conflicts through planning efforts.
	Remove root barriers as a practice	Not a BMP
	Establishment care	Stake removal, watering schedule, watering for high heat and drought, young tree structural pruning, 3 years of establishment care watering is BMP
	Mature tree pruning	Update foliage % allowed for removal to BMPs
	Removal	Ensure consideration for all mitigation measures prior to tree removal
Sustainability Considerations	Specify guidelines for “drought tolerant species”	Utilize WULCOS and most recent research
	Prioritize shade potential when selecting tree species	Currently aesthetic value is considered as a primary consideration
	Species metrics for sustainable urban forest (10% of any species, 20% of any genus, and 30% of any family)	Current research states 5% for any species is a stronger resiliency metric
	Consider increasing species diversity in historic groves	Vulnerable to pest or pathogen targeting specific species
	Tree maintenance debris and urban wood	Utilize debris to highest next value and utilize tree debris as a bioresource
Protection Mature Trees	Add Tree Protection Zone (TPZ) parameters to retain trees during construction	ISA BMP for construction

	Clarify consideration of all infrastructure mitigation procedures	Ensure process is transparent to community
	Develop a systematic and methodological procedure for assessing trees	Tree risk: current state for designated time frame Tree health: potential for tree to recover after infrastructure mitigation methods /root pruning
Specify Decision Makers	Ensure all decision makers for trees have the proper certifications	ISA Certified Arborist for health related decisions and an ISA Tree Risk Assessment Qualified Arborist (TRAQ) for risk related assessments.
Clarify BMPs for Adjacent Property Owner	Increase standard of care to BMPs	3 years establishment care watering to be added to community education

2. Addressed Through Community Engagement

The following are items from community engagement efforts which are in the process of being addressed through this project.

Revision Item	Revision Recommendation	Details of Revision
Who manages the urban forest?	Clarify what credentials qualify a person to manage the urban forest	Tree Health: ISA Certified Arborist (Municipal Specialist) Tree Risk: ISA TRAQ
Concerns for wildlife and nesting season	Elevate contract with tree maintenance provider to require a biologist survey pre-pruning for each tree, report avian activity monthly	City targets October - March/April to schedule all grid pruning each year. If funding remains, April - June schedules tree pruning to get ahead of schedule and responsibly utilize public funds.
		Ensure in-house and contractors follow Tree Care for Birds and Other Wildlife BMP
Assessing potential tree risk	Specify who is qualified to assess tree risk for a Tree Risk Assessment Program	Assessing Potential Tree Risk - ISA Certified Arborist - Tree Risk Assessment Qualification (TRAQ)
	Tree Risk Assessment Program	Systematic procedure for risk assessment and risk mitigation methods.
		Proactive management practice to mitigate risk while trees are standing.
Increase in transparency	Hazardous, Dead, Emergency, or Public Safety tree removal transparency procedure*	TRAQ program (above) to assess hazardous trees for mitigation methods prior to emergencies
		Opportunity for public comment. 15 days OR scheduled Tree Committee meeting
	Diseased, Dying, and "Other" Removals tree removal transparency procedure**	If protested, third party qualified assessor provides recommendation

3. Proposed Process for Tree Removals (DRAFT)

The following are proposed processes to increase transparency when the City performs tree removals. Proposed processes provide transparency of assessment processes and due diligence of a systematic assessment system for each tree. The proposed timeline gives community members an opportunity to protest removals and allow a process for a third party assessment.

* Hazardous, Dead, Emergency, or Public Safety transparency

- 1** City may remove tree without notice.
- 2** City submits list of performed removals and tree planting monthly to Community & Human Services Commission.
- 3** In submittal, provide removal and planting information, documented systematic process that was followed, and tree debris management decisions.

** Proposed – Diseased, Dying, and “Other” Removals

Clarify: Preservation is always the goal when assessing a tree for potential removal.

- 1** City to perform systematic tree health/arboriculture assessment prior to being placed on removal list. (In-house)
- 2** Post list of proposed removals with either 15 days to respond or a scheduled Tree Committee meeting. Include assessment documentation.
- 3** Identify trees being protested.
- 4a** Arborist report. (Third Party*- additional cost)
- 4b** IF pest or pathogen related, lab work. (Outside service - additional cost)
- 5** Removal or mitigation recommendation made by outside service (See step 4)
- 6** Updates to protested tree removals posted with additional assessment paperwork/photos.

4. Unfeasible Tree and Infrastructure Conflict Resolutions

The Community Services Department and project consultants met with the Community Development Department to discuss the potential tree and infrastructure conflict resolutions that may be considered for the City. The following is a list of items that were deemed NOT feasible. Feasible options were presented during a community meeting on 12/4/23. Feasible options to be implemented upon tree planting will be captured in the draft revision of the Manual under considerations when planting new trees.

Resolution Method	Limitation
Rubberized Pavers	Increase in maintenance to straighten upon lifting. Roots are not redirected allowing for increase in future conflict
Pavers	Water on surface Potential tripping hazard in public areas
Monolithic sidewalk	Greatly increases maintenance cost. Does not meet City standards
Curb realignment	Non-standard feature with liabilities such as removing bike lanes. Potential to implement as part of designing a roadway
Curving or offset sidewalk	Concern for blind residents
Root barriers	Not BMP from arboriculture perspective Does not develop proper root structure for tree

Committee Member Binder moved to approve the Consent Calendar, seconded by Committee Member Sifuentes, and carried on a roll call vote as follows:

AYES: ***Committee Member – Binder, Brower, Sifuentes***
NOES: ***Committee Member – None***

ADMINISTRATIVE ITEM

2. Updates to the Tree Policies and Guidelines Manual

Cari Dillman, Community Services Manager, and Kanami Otani, Dudek Urban Forest Planner, provided a PowerPoint presentation.

Staff and Ms. Otani responded to questions from the Committee regarding the notification process for non-emergency removals, public outreach methods, the structure of tree pits vs. tree wells, responsibility for inspection of nursery stock, and the process for making future updates to the Manual.

Chair Brower invited public comment.

Senior Administrative Assistant Ross announced that no written public comment had been received on this item.

There were no requests to speak.

Committee Member Binder moved to recommend that the Community and Human Services Commission approve the Tree Policies and Guidelines Manual as presented, seconded by Chair Brower, and carried on a roll call vote as follows:

AYES: ***Committee Member – Binder, Brower, Sifuentes***
NOES: ***Committee Member – None***

ADJOURNMENT

Committee Member Brower adjourned the meeting of the Tree Committee at 6:53 PM.

Nancy Brower
 Committee Chair

Dawn Bonnell Ross
 Recording Secretary

There were no requests to speak.

1. Community and Human Services Commission Regular Meeting Minutes of December 4, 2024
 Approved the Community and Human Services Commission regular meeting minutes of December 4, 2024.
2. Committee Meeting Minutes
 Received and filed the various Committee meeting minutes.
3. Tree Plantings and Removals for October 2024
 Received and filed the report on tree plantings and removals for October 2024.

Commissioner Silva moved to approve the Consent Calendar, seconded by Commissioner Roselle, and carried on a roll call vote as follows:

AYES: Commissioner – Binder, Brower, Glass, Roselle, Sifuentes, Silva
NOES: Commissioner – None
ABSENT: Commissioner – Scott Toux

ADMINISTRATIVE ITEM

4. Updates to the Tree Policies and Guidelines Manual

This item starts at 00:08:52 in the archived video.

Jeremy Swan, Community Services Director, and Kanami Otani, Dudek Urban Forest Project Manager, provided a PowerPoint presentation.

Director Swan, Supervisor Hecker, and Ms. Otani responded to questions from the Commission regarding the timing of and procedure for notifications for proposed non-emergency removals; whether City arborists and contract tree trimmers are required to carry a copy of the Manual; the most common types of comments received during the public input period; possible reasons for lack of public attendance at the meeting; including a replacement plan when posting removal notifications; specific species considered “nuisances”; the likelihood of approval of removal requests due to nuisance debris; the make-up of the arboriculture industry; feedback from the community regarding transitioning from monoculture planting to expanding species diversity; the cost of root bridging vs. root pruning and replacing adjacent concrete; reconciling ADA-compliance with infrastructure conflict resolution methods; whether the urban forestry program budget will be sufficient to fund required back-up materials for objected removals (e.g. reports, lab work, etc.); possible number of objections; the timeline for bringing an update to the Commission City Council approval of the updated Manual; and public outreach regarding the importance of species diversification.

The Commission commended and thanked the Tree Committee Members and staff for their work on updating the Tree Policies and Guidelines Manual and continued work with the residents on educating them about tree care and the City's efforts to maintain the urban forest.

Chair Sifuentes invited public comment.

Senior Administrative Assistant Ross announced that no written public comment had been received on this item.

There were no requests to speak.

Commissioner Roselle moved to approve the Tree Policies and Guidelines Manual as presented and to forward the Manual to the City Council for approval, seconded by Commissioner Binder, and carried on a roll call vote as follows:

AYES: Commissioner – Binder, Brower, Glass, Roselle, Sifuentes, Silva

NOES: Commissioner – None

ABSENT: Commissioner – Scott Toux

REPORTS

Staff

This item starts at 01:09:05 in the archived video.

Jeremy Swan, Community Services Director, reported that work will begin on the Lewis Park Playground project on Tuesday, January 21. Construction is expected to take 4-5 weeks, with a possible reopening in mid-March.

Director Swan also reported on the City's response to the recent windstorm. The Community Services and Police Departments received combined approximately 140 calls for service. Reports included thirty-five downed trees, ten downed street signs, one downed street light pole, and two downed power poles. There was very little damage to structures. The bulk of staff response has been for clean-up of debris and branches. Minor staff response was required overnight the night of the windstorm. Beginning the next morning, staff has been working six days a week on cleanup.

Director Swan responded to questions from the Commission regarding preparation for expected winds, weed abatement efforts to mitigate fire risk, plans for a reopening event for Lewis Park, clean-up of debris from City and private property, and costs of and funding for windstorm cleanup.

The Commission shared their compliments to staff for the windstorm response.